DOCUMENT RESUME

ED 323 392 CE 055 800

AUTHOR	Kauer, Les
TITLE	Introduction to Agricultural Sales and Service. Teacher Edition.
INSTITUTION	Oklahoma State Dept. of Vocational and Technical Education, Stillwater. Curriculum and Instructional Materials Center.
PUB DATE	90
NOTE	954p.
AVAILABLE FROM	Curriculum and Instructional Materials Center, Oklahoma Dept. of Vocational and Technical Education, 1500 West Seventh Avenue, Stillwater, OK 74074 (order no. AG1039: $46.00).
PUB TYPE	Guides - Classroom Use - Guides (For Teachers) (052)
EDRS PRICE	MF06 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS	Advertising; *Agribusiness; Communication Skills; Competency Based Education; Free Enterprise System; Interpersonal Competence; *Marketing; *Merchandising; Occupational Information; Occupational Safety and Health; Postsecondary Education; Retailing; *Salesmanship; Secondary Education; State Curriculum Guides; Vocational Education
IDENTIFIERS	*Customer Service; *Oklahoma; Security (Workplace)

ABSTRACT

This Oklahoma curriculum guide contains 12 units. Each instructional unit includes some or all of these components: performance objectives, suggested activities, basic academic skills taxonomy, handouts, information sheets, supplements, transparency masters, activity sheets, assignment sheets, assignment sheet answers, job sheets, practical tests, written tests, and written test answers. All of the unit components focus on measurable and observable learning outcomes. The 12 units are as follows: (1) introduction to agricultural sales and service; (2) providing for health and safety in the workplace; (3) providing for personnel and store security; (4) using effective communication skills; (5) using human relations skills; (6) handling money; (7) using the cash register; (8) selling and customer service; (9) merchandising; (10) using display techniques; (11) advertising; and (12) free enterprise, government, and the American market. (CML)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED323392

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)
☑ This document has been reproduced as received from the person or organization originating it.
☐ Minor changes have been made to improve reproduction quality.
● Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL IN MICROFICHE ONLY HAS BEEN GRANTED BY
S Stone
TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

INTRODUCTION TO
Agriculture Sales and Service

CE 055 800

CIMCO
Teacher Edition

Oklahoma Department of
Vocational and Technical Education
1500 West Seventh Avenue
Stillwater, OK 74074-4364

2

Ag 1039

90-007468

Introduction To Agricultural Sales and Service

Developed by the
Curriculum and Instructional Materials Center
for the Division of Agricultural Education
Oklahoma Department of Vocational and Technical Education

90-007468

AG 1039

Copyright 1990

Oklahoma Department of Vocational and Technical Education
Curriculum and Instructional Materials Center

All rights reserved.

Printed in the United States of America by the
Oklahoma Department of Vocational and Technical Education
Stillwater, Oklahoma 74074-4364

This publication, or parts thereof, may not be reproduced in any form by photographic, electrostatic, mechanical, or other methods, for any use including information storage and retrieval, without written permission from the publisher.

Use of commercial products in these instructional materials does not imply endorsement by the Oklahoma Department of Vocational and Technical Education. Publications and audiovisual material mentioned in the Suggested Resources section of each unit were available at the time of publication.

The Oklahoma Department of Vocational and Technical Education does not discriminate on the basis of race, creed, color, national origin, sex, age, veteran status, or qualified handicap.

TABLE OF CONTENTS

Unit I
Introduction to Agricultural Sales and Service . . . . I - 1

Unit II
Providing for Health and Safety in the Workplace . . . . II - 1

Unit III
Providing for Personnel and Store Security . . . . III - 1

Unit IV
Using Effective Communication Skills . . . . IV - 1

Unit V
Using Human Relations Skills . . . . V - 1

Unit VI
Handling Money . . . . VI - 1

Unit VII
Using the Cash Register . . . . VII - 1

Unit VIII
Selling and Customer Service . . . . VIII - 1

Unit IX
Merchandising . . . . IX - 1

Unit X
Using Display Techniques . . . . X - 1

Unit XI
Advertising . . . . XI - 1

Unit XII
Free Enterprise, Government, and the American Market . . . . XII - 1

FOREWORD

The Oklahoma Department of Vocational and Technical Education is committed to economic development. Examples of this committment can be seen in the many services vocational-technical education offers to Oklahoma's students.

One section of the economy that has a great deal of impact on the state's economy is agricultural sales and service. The demand for qualified employees in agricultrual sales and service is growing. Graduates of quality agricultural programs can help to meet this growing demand.

This publication provides valuable competencies for students with career aspirations that include agricultural sales and service

Edward G. Smith, State Supervisor
Agricultural Education
Oklahoma Department of Vocational
and Technical Education

PREFACE

Technology has become vital to successful agricultural ventures. With the technology comes a crucial need for up-to-date information, a ready supply of equipment and machinery, and all of the corollary materials need for the production of food and fiber.

To make it all work there must be a knowledgeable, efficient and capable workforce to fill these needs. Introduction to Agricultural Sales and Service offers the student the opportunity to develop skills which are basic to any agricultural career.

Students completing this program will find that they are better equipped to compete for jobs or will run their own businesses with greater efficiency and success.

Randy Kirk, Curriculum Specialist
Curriculum and Instructional Materials Center
Oklahoma Department of Vocational and
Technical Education

ACKNOWLEDGEMENTS

Many individuals are responsible for the development of this publication. Appreciation is expressed to the committee members for the thorough job they did in determining the technical content and validating the completed work. The members of the committee were:

Brad Ashpaugh
Agricultural Education Instructor
Laverne High School

Dr. L.D. Barker
Professional Animal Health, Inc.
Oklahoma City, Oklahoma

Bruce Farquar
Agricultural Education Instructor
Altus High School

Alan Jobes
Farmers' Coop
Perry, Oklahoma

G.T. Moody
Agricultural Education Instructor
Holdenville High School

This publication was written by Les Kauer who has 25 years executive level human resource management experience. Les is self-employed developing training programs and procedural manuals for small and mid-sized businesses. He has a number of years of involvement with the Oklahoma DECA program and was a board member for the Foundation for Vocational Technical Education.

Special thanks also go to former CIMC technical writer Terri Barnes.

Bob Davis and his staff in the Art Department are due recognition for the excellent artwork found in this publication.

The CIMC staff is due a big "thank you" for their support and help in every phase of production.

Kathleen Kincaid
Resale Business Manager

Barbara Kuehl
Secretary

Craig Maile
Curriculum Specialist

Greg Pierce
CIMC Coordinator

Michelle Sharp
Publications Design Specialist

Darrell Stiles
Warehouse Manager

Sheila Stone
Development Coordinator

Brenna Tillman
Desktop Publishing Operator

Terri Tomson
Word Processor

Patsy Treat
Secretary

Sherry Wietelman
Curriculum Specialist

Much appreciation goes to the Division of Agricultural Education Department for their help and encouragement, especially

Phil Berkenbile
District Supervisor, N.W.

Eddie Smith
State Supervisor

Beth Ann Chlouber, Technical Writer, spent a great deal of time and played a major role in producing this publication. My thanks to her.

Randy Kirk, Curriculum Specialist
Curriculum and Instructional Materials Center
Oklahoma Department of Vocational and Technical Education

USE OF THIS PUBLICATION

INSTRUCTIONAL UNITS

Introduction to Agricultural Sales and Service contains twelve units. Each instructional unit includes some or all of the basic components of a unit of instruction: performance objectives, suggested activities, basic academic skills taxonomy, handouts, information sheets, supplements, transparency masters, activity sheets, assignment sheets, assignment sheet answers, job sheets, practical tests, written tests, and written test answers. Practical tests and written tests are included in the instructor edition only, and may be duplicated for classroom use or copies may be purchased in Oklahoma by calling 800-522-5810. Out-of-state instructors may order test packets by calling 800-654-4502.

All of the unit components focus on measurable and observable learning outcomes. Instructors are encouraged to supplement, personalize, localize, and motivate with these materials in order to develop a complete teaching/learning process.

Units of instruction are designed for use in more than one lesson or class period of instruction. Careful study of each unit of instruction by the instructor will help him or her determine the following:

- Amount of material that can be covered in a class period
- Skills that must be demonstrated
    - Supplies and equipment needed
    - Amount of class time needed for demonstrations
    - Amount of time needed for student practice
- Supplementary materials, including print and non-print media to be ordered
- Resource people to be contacted

Objective Sheets (White Pages)

Each unit of instruction is based on performance objectives. Performance objectives are stated in two forms: unit objectives, stating the subject matter to be covered in a unit of instruction, and specific objectives, stating the performance necessary to meet the unit objective.

The unit objective states the overall goal of the unit. It tells what the student should be able to do and what standard will be used to determine whether the student has achieved competency. Specific objectives outline the teaching sequence of the competencies required to meet the unit objective.

The objectives should be provided for students and their importance stressed throughout the teaching/learning process. By doing this, instructors will help answer any questions concerning performance requirements for each instructional unit. Instructors can also use the objectives to plan teaching strategies and instructional methods. Instructors should prepare for each unit by deciding how each objective can best be taught.

Instructors should feel free to modify, delete, or add objectives in order to meet the needs of the students and community. When objectives are added, the instructor should remember to supply the needed information, assignment sheets, job sheets, and criterion test items.

Suggested Activities (Pink Pages)—**Instructor's Edition Only**

The suggested activities component is to assist during the preparation stage of the teaching/learning process. The activities provide suggestions for delivery, application, and evaluation during the instructional process. Teaching suggestions are included for each objective. The instructor should read the suggested activities before teaching the units to allow time to obtain supplemental materials, prepare audiovisual materials, and contact outside resource persons. Duties of the instructor will vary according to the particular unit.

Listed are suggested resources including people and print and non-print media that may be used to teach the unit. Unit references used in the development of each unit are also provided. The instructor can use suggested resources and unit references to supplement her or his knowledge of the subject or to help students with particular interests or objectives in the area covered. Please note that suggested resources and references listed in this publication existed when this publication was written. CIMC assumes no responsibility for providing these materials and cannot ensure the availability of these materials as individual vendors, manufacturers, and publishers may discontinue these products at any time.

Teacher Supplements (Pink Pages)—**Instructor's Edition Only**

The teacher's supplements found in some units of this publication contain information that will aid the instructor in his presentation of the materials. In some cases, the instructor may want to distribute the information to the class. The development committee felt that although this information was useful, it would be up to the individual instructor to determine how it should be used.

Basic Skills (Pink Pages)—**Instructor's Edition Only**

The Basic/Essential Skills Taxonomy, 2nd ed., by Lester M. Snyder, Jr., was used to identify the basic academic skills applied in each objective. *Introduction to Agricultural Sales and Service* uses criterion-referenced testing, which identifies cognitive and psychomotor skills, stated as performance objectives, that students are expected to learn. In *Introduction to Agricultural Sales and Service*, all of the cognitive and psychomotor skills also require student to use academic skills. *The Basic/Essential Skills Taxonomy* provides a means for identifying academic skills students use in meeting the performance objectives.

Handouts (White Pages)—**Instructor's Edition Only**

Handouts provide "nice-to-know" information that is not testable. Handouts provide the instructor with additional information and activities. They may also include items for the gifted or remedial student. The instructor may decide whether to use handouts in teaching the unit.

Information Sheets (Green Pages)

The information sheets provide "must know" content that is essential for meeting the cognitive objectives. The information sheets serve as an excellent guide for presenting background knowledge necessary to develop the skills specified in the unit objective. They may also be used for coordination activities and advisory committee meetings.

Students should read the information sheets before the information is discussed in class. Space is provided in margins for students and instructors to add notes that supplement, localize, personalize, or provide motivation for each unit.

The information sheets may include notes, cautions, or warnings. These should be discussed carefully and thoroughly. Notes are short verbal additions to the information or procedural outline that provide nice-to-know and decision-making information. A note may tell the student what to look for or consider at a given step, or may explain when a step may not be applicable. Notes offer guidance that may help the student understand the process and accomplish it more efficiently. Warnings are advisories that alert the student to possible danger to himself or herself or others. Cautions are advisories that alert the student to possible danger to equipment or facilities.

Supplements (Green Pages)

Supplements are in the instructor and student material. Supplements include instructions that could be used for solving problems or reinforcing the enrichment of learning. The information presented in a supplement may consist of tables, charts, written information, forms, or other information students will need in order to complete one or more of the assignments or job sheets. While supplements are not tested over directly, they may be used to assist in meeting the performance objectives.

Transparency Masters (White Pages)

With transparency masters, the students may see as well as hear about the material being presented, thus reinforcing the learning process. Transparencies may present new information or they may reinforce information presented in the information sheets or assignment sheets.

Transparencies should be made and placed in the instructor's notebook, where they will be immediately available for use. Transparencies direct the class's attention to the topic of discussion. Transparencies should be left on the screen only when topics shown are being discussed.

Activity Sheets (Tan Pages)

The purpose of activity sheets is to provide activities which support several objectives. Activity sheets vary greatly in their number and design from unit to unit. Some activity sheets deal with the student's attitudes and beliefs. These may ask rather personal questions and are only intended for each students' personal use. Some activity sheets may require the student to monitor his or her own actions or other personal variables over a period of time. Answer sheets may or may not be included.

Assignment Sheets (Tan Pages)

Assignment sheets are written exercises that have students apply higher order thinking skills. The introduction to the assignment sheet explains how the assignment relates to the subject area and unit objective and may provide instructional information or refer students to another component for such information.

Often, assignment sheets will contain case studies, story problems, or other situations in which the student must analyze the circumstances and determine correct responses. Students may be given assignment sheets as classwork or homework.

Assignment Sheet Answers (Pink Pages)—**Instructor's Edition Only**

This component is designed to assist the instructor in evaluating student performance on assignment sheets.

Job Sheets (Blue Pages)

Job sheets provide a list of equipment, tools, and materials needed to complete a manipulative or psychomotor skill. They describe a step-by-step procedure to complete each task or job. Diagrams, photographs, and illustrations assist students in achieving the skill.

The instructor should demonstrate the procedures outlined in each job sheet. Furthermore, the instructor needs to localize the procedure according to the equipment and supplies available in the local situation. Job sheets also show potential employers what skills the student has been exposed to and the performances one might reasonably expect from a student who has had this vocational instruction.

Practical Tests (Yellow Pages)—**Instructor's Edition Only**

The practical tests assist the instructor in evaluating the psychomotor activities (Job Sheets). The practical tests provide instructors with a valid mechanism for determining a student's level of ability to perform the procedure stated on the job sheet and provide the instructor with a means of evaluating the students' final product.

Written Tests (Yellow Pages)—**Instructor's Edition Only**

This component provides criterion-referenced evaluation of every objective listed in the unit of instruction. All performance objectives, including those in the information sheets, assignment sheets, and job sheets must be evaluated. If objectives have been added, deleted, or modified, appropriate changes should be made on the test.

The tests may be written or oral. It is recommended that the tests be divided into shorter tests covering three or four objectives at a time and given soon after those objectives have been covered.

The acceptable response on a written test, eighty-five (85) percent in most units, may be raised or lowered to fit the topic or student ability level. The percentage applies to the overall score, not to each individual question. The final unit grade should be obtained by combining written test and assignment sheet scores, and by considering how well the student demonstrated the desired skills.

Written Test Answers (Pink Pages)—**Instructor's Edition Only**

This component is designed to assist the instructor in evaluating student performance on written tests.

PAGE NUMBERING

Each publication for the CIMC is assigned a specific abbreviation or will be recognized by the book title. *Introduction to Agricultural Sales and Service* will be referred to by title. Each unit is identified by the unit number in Roman numerals. Each unit in the publication begins with page 1. The page number for an objective sheet in *Introduction to Agricultural Sales and Service* looks like the following:

OBJECTIVE SHEET - Sales and Service
I - 1

METHODS OF DISSEMINATING MATERIAL

Each student should be provided with student materials. Materials may be purchased for less than an instructor can reproduce them, especially when the instructor's time is considered. Student materials contain everything but the suggested activities, handouts, assignment sheet answers, tests, and test answers. Written test packets may be purchased from the Curriculum and Instructional Materials Center. The student should be allowed to take his or her materials home at the end of the year.

TEACHING METHODS

It is a challenge to keep students motivated. Instructors can supplement the objectives by providing the "why," personal experiences, and current information. Preparation for each unit should be determined by how each objective can best be taught. Students should become involved in preparing and planning for each unit.

COMPETENCY PROFILES

A competency profile is available for each CIMC publication. Competency profiles document student performance. The profile contains a list of the specific competencies that a student should achieve before leaving the training program. Profiles should be distributed to students as needed.

CORRECTIONS AND SUGGESTIONS

The Curriculum and instructional Materials Center (CIMC) wants to provide vocational instructors and students with materials that are accurate and effective. Although the CIMC strives to maintain the highest standards of development and production, oversights occasionally do occur. If you find any errors in this or other CIMC publications, or have suggestions for improving their usefulness in vocational programs, please notify the CIMC staff. One easy way of pointing out errors is to make a photocopy of the affected page and to indicate the correction on the copy. Mail this information to the CIMC, where it will be used to correct the publication before the materials are reprinted.

To ensure that the material is updated on a timely basis, notify the CIMC of necessary corrections as soon as possible after discovering the error. Do not assume that someone else will notice the error and inform the CIMC; other users may be making the same assumption. Please send corrections and recommendations for improving this publication to the following address:

Curriculum Development Coordinator
Curriculum and Instructional Materials Center
Oklahoma Department of Vocational and Technical Education
1500 West Seventh Avenue
Stillwater, Oklahoma 74074-4364

OBJECTIVE SHEET

INTRODUCTION TO AGRICULTURAL SALES AND SERVICE

I

INTRODUCTION

Agriculture offers many diverse opportunities. A career in agricultural sales and service can be challenging and rewarding. In order to be successful in any career takes planning. You must be aware of job opportunities, job requirements, and benefits. Now is the best time to explore career opportunities and start planning for your career.

As you begin thinking about these plans and the multitude of choices, you will want to get all the information possible about the various occupations and professions that interest you.

The purpose of this unit is to assist you in exploring the various occupations and professions that are associated with agricultural sales and service.

UNIT OBJECTIVE

After completing this unit, the student should know about career fields, training requirements, advancement possibilities, and employee benefits and compensation for jobs in agriculture. The student will demonstrate these competencies by completing the assignment sheets and written test with a minimum of 85 percent accuracy.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to

1. Match terms associated with agricultural occupations to their correct definitions.
2. List occupations available in agricultural sales and service.
3. List the skills required to be employed in agricultural sales and service occupations.
4. Discuss training requirements and advancement possibilities for careers in agricultural sales and service.
5. List steps and strategies of career decision making.
6. Match terms associated with employee compensation and benefits to their correct definitions.
7. Distinguish among payroll deductions.
8. List benefits that employees may receive.
9. Search newspapers or trade journals for job opportunities in agricultural sales and service. (Assignment Sheet 1)

10. Survey agricultural sales and service occupations in your area. (Assignment Sheet 2)

SUGGESTED ACTIVITIES

INTRODUCTION TO AGRICULTURAL SALES AND SERVICE

I

PREPARATION

- Obtain materials to supplement unit.

  NOTE: See Suggested Resources.

- Review instructional outline for this unit. Modify time frames to suit class needs and plan activities for each class period.

- Study the specific objectives to determine those you will cover in your presentation. Decide also which objectives should be taught to which students.

- Determine scope and sequence of objectives that you add. Design and develop support materials, including evaluation techniques, for additional objectives.

- Determine how you will schedule time for students to demonstrate competence in the required procedures.

- Make arrangements for guest speakers. Supply speakers with specific objectives and other appropriate sections of the unit.

- Prepare classroom.
  - Put up posters, charts, or other items dealing with careers in agricultural sales and service.
  - Have articles, brochures, and other reference literature dealing with careers in agricultural sales and service available for students.

DELIVERY

Objective 1

- Discuss with students that the purpose of this unit is to assist them in exploring various sales and service occupations and to help them begin focusing on an area of interest.

- Discuss terms associated with agricultural occupations. Provide students with examples to illustrate terms when possible.

Objective 2

- Discuss occupations available in agricultural sales and service. Ask students what occupations they are interested in.

- Show the video *Kaleidoscope of Careers - Tape 4*.
- Have representatives from various agribusinesses discuss careers in agricultural sales and service.
- Have a "self-employed" agribusiness person speak to the class on the opportunities and challenges of being self-employed or starting your own agribusiness.
- Discuss resources students can use when researching jobs.
- Use the *Dictionary of Occupational Titles* (DOT).
- Have students complete Activity Sheets 1 and 2.

Objective 3

- Discuss skills required to be employed in agricultural sales and service occupations. Provide examples of the skills and discuss why they are important. Also point out how these skills are applicable to most any occupation students decide to enter.

Objective 4

- Discuss training requirements and advancement possibilities for careers in agricultural sales and services.
- Bring advertisements for jobs to class and discuss training requirements and advancement possibilities for them.
- Discuss how more training and experience generally lead to higher salaries.

Objective 5

- Discuss steps and strategies of career decision making.
- Have students complete Assignment Sheets 1 and 2.

Objectives 6 through 8

- Discuss terms associated with employee compensation and benefits.
- Discuss payroll deductions. Show students an illustrative example of payroll deductions. Use Transparency Masters 1 through 4.

- Discuss benefits that employees may receive. Emphasize that benefits are an important consideration when looking at job opportunities.

APPLICATION

Objectives 9 and 10

- Use Assignment Sheet 1 to give students practice in searching newspapers and trade journals for job opportunities.

- Use Assignment Sheet 2 to give students practice in surveying the agricultural sales and service occupations in your area.

Written Test

- Explain to students that they will be asked to demonstrate on the written test actions listed in the specific objectives.

- Give written test.

  NOTE: The written test may be given in sections if desired.

- Evaluate students on assignment sheet activities if not previously done.

- Reteach and retest if necessary.

- Complete appropriate section of competency profiles.

- Review individual and group performance in order to evaluate teaching methods. Adjust scope, sequence, or instructional approaches for additional lessons as required.

SUGGESTED RESOURCES

Audiovisual Materials

- Kaleidoscope of Careers - Tape #4, Color, 1/2" VHS, 40 minutes. Ace Dist. Service/Kansas Career, 1987. Available from Ace Dist. Service/Kansas Career, 363 Bluemont Hall/Kansas State Manhattan, KS 66506 (913) 532-6540. This tape includes careers on service occupations, agriculture, forestry, fishery workers, mechanics, and repairers.

NOTE: This video is available to Oklahoma teachers on a free-loan basis. Oklahoma teachers may order this video from the Oklahoma Department of Vocational and Technical Education, Resource Center, ATTN: Instructional Media Specialist, 1500 West Seventh Avenue, Stillwater, OK 74074, phone 800-522-5810. Out-of-state teachers must order from the address listed with the video.

Publications

- *Career Information Center Series, Volume 13, Agribusiness, Environment and Natural Resources*, 3rd ed., Glencoe Publishing Company, Mission Hills, California, 1987.
- *Career Information Center Series, Vol. 2, Appendix and Master Index*, 3rd ed., Glencoe Publishing Company, Mission Hills, California, 1987.
- *Dictionary of Occupational Titles*, (DOT), Department of Labor.
- *Employment Opportunities for College Graduates in the Food and Agricultural Sciences*, U.S. Department of Agriculture, Washington, D.C., 1986.
- *The Encyclopedia of Careers and Vocational Guidance, Volume I, Reviewing Career Fields*, J.G. Ferguson Publishing Company, Chicago, Illinois, 1987.
- Hoover, Norman K., *Handbook of Agricultural Occupations*, 4th ed., The Interstate Printers and Publishers, Inc., Danville, Illinois, 1985.
- *Occupational Outlook Quarterly*, Occupational Outlook Service, Bureau of Labor Statistics, U.S. Department of Labor, Washington, D.C., Summer 1988.
- *Occupational Projections and Training Data*, 1988 Edition, Bureau of Labor Statistics, U.S. Department of Labor, Washington, D.C., 1988.
- Stone, Archie A., et al., *Careers in Agribusiness and Industry*, 3rd ed., The Interstate Printers and Publishers, Inc., Danville, Illinois, 1980.
- White, William C., and Donald N. Collins, *Opportunities in Agricultural Careers*, VGM Career Horizons, A Division of National Textbook Company, Lincolnwood, Illinois, 1988.

UNIT REFERENCES

- *Career Choices in the New Agriculture*, Oklahoma State University Cooperative Extension Service, n.d.
- *Career Information Center Series, Volume 13, Agribusiness, Environment and Natural Resources*, 3rd ed., Glencoe Publishing Company, Mission Hills, California, 1987.
- *Career Information Center Series*, Volume 2, *Appendix and Master Index*, 3rd ed., Glencoe Publishing Company, Mission Hills, California, 1987.
- *Career Information Center Series*, Volume 10, *Marketing and Distribution*, 3rd ed., Glencoe Publishing Company, Mission Hills, California, 1987.
- *Distributive Education II*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1976.
- *Employment in Agribusiness*, Mid-America Vocational Curriculum Consortium, 1984.
- *The Encyclopedia of Careers and Vocational Guidance, Volume I, Reviewing Career Fields*, J.G. Ferguson Publishing Company, Chicago, Illinois, 1987.
- *The Encyclopedia of Careers and Vocational Guidance, Volume II, Selecting a Career*, J.G. Ferguson Publishing Company, Chicago, Illinois, 1987.
- *The Encyclopedia of Careers and Vocational Guidance, Volume III, Selecting a Technicians Career*, J.G. Ferguson Publishing Company, Chicago, Illinois, 1987.
- Hoover, Norman K., *Handbook of Agricultural Occupations*, 4th ed., The Interstate Printers and Publishers, Inc., Danville, Illinois, 1985.
- *Legal Considerations in Organizing a Business in Oklahoma*, OSU Extension Facts No. 175, Oklahoma State University Cooperative Extension Service, n.d.
- *Occupational Outlook Quarterly*, Occupational Outlook Service, Bureau of Labor Statistics, U.S. Department of Labor, Washington, D.C., Summer 1988.
- *Occupational Projections and Training Data*, 1988 Edition, Bureau of Labor Statistics, U.S. Department of Labor, Washington, D.C., 1988.

- *Oklahoma: Focus on Agriculture*, Oklahoma State University Cooperative Extension Service, n.d.

- Stone, Archie A., et al., *Careers in Agribusiness and Industry*, 3rd ed., The Interstate Printers and Publishers, Inc., Danville, Illinois, 1980.

- White, William C., and Donald N. Collins, *Opportunities in Agricultural Careers*, VGM Career Horizons, A Division of National Textbook Company, Lincolnwood, Illinois, 1988.

BASIC SKILLS

The following table identifies the basic academic skills that are reinforced in this unit of instruction. These basic academic skills were identified using *The Basic/Essential Skills Taxonomy*, 2nd ed. and verified during the validation process.

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 1	Language Arts 013	Applies/Uses	Definitions	
	Science 466	Identifies	Definitions	
	Free Enterprise 006	Defines	Economic terms	
OBJECTIVE 2	Free Enterprise 114	Describes/ Explains	Needs/wants	
OBJECTIVE 3	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 4	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
OBJECTIVE 5	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 6	Free Enterprise 006	Defines	Economic terms	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 7	Language Arts 013	Applies/Uses	Definitions	
	Free Enterprise 006	Defines	Economic terms	
	Free Enterprise 118	Identifies	Cost factors	
OBJECTIVE 8	Free Enterprise 121	Identifies	Cost factors	Fringe benefits
OBJECTIVE 9	Language Arts 035	Attends	Directions/ task	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
	Language Arts 180	Evaluates	Information-written	
OBJECTIVE 10	Language Arts 035	Attends	Directions/ task	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
	Language Arts 180	Evaluates	Information-written	
	Language Arts 167	Evaluates	Information-oral	
	Language Arts 058	Composes/ Edits	Forms/ documents	
	Language Arts 272	Uses	Library resources	

OKLAHOMA AGRICULTURE

Oklahoma agriculture is much more than cattle and wheat. Some of the important agricultural livestock and crops are discussed below.

LIVESTOCK

Oklahoma is known for its production of cattle and is often referred to as "Cow Country." While cattle far outrank the other livestock categories, poultry, swine, and sheep are strongly represented. A mainstay in the agricultural industry in Oklahoma, livestock production is important to the state's economy and will continue to remain a major source for domestic and worldwide demand for livestock.

Beef Cattle

Oklahoma is one of the largest producers of beef cattle in the United States, and beef is a major agricultural product in the state. Thousands of head of cattle are raised each year in the western section of Oklahoma, while thousands of head are brought into the state to be placed in the well-known feeder lots in the Panhandle. A large percentage of these herds go outside the state for domestic and foreign use.

Dairy Cattle

Oklahoma's cattle population includes dairy as well as beef cattle. Located in central Oklahoma, the dairy industry supplies milk and milk products for domestic consumption.

Swine

Swine are raised on many Oklahoma farms, although the majority are found in northern and central Oklahoma. Swine are raised mostly for domestic use. However, there is a growing market for exporting some processed pork.

Sheep

Although sheep are raised largely for use in the domestic market, the sheep industry in Oklahoma continues to grow. Most of the sheep are presently being raised in the northern and central sections of the state, although many of the southwestern counties are increasing their production.

Poultry

The poultry industry is one of the largest in the state. Primarily located in eastern Oklahoma, this industry represents a large export market for processed fryers and broilers, as well as a large domestic market. As consumer demand increases, the poultry industry will climb in importance.

Horses

Oklahoma, always well known for its fine Quarter Horses, is fast becoming a leader in all facets of the horse industry. With almost every breed represented in the state, Oklahoma horses are used for work, pleasure, and for racing. The source of many world champions, the Oklahoma horse industry is diversified.

CROPS

Oklahoma, the buckle of the Sunbelt, is a large domestic and foreign exporter of agricultural products. Ranked high in its production of wheat, cotton, milo, alfalfa hay and seed, soybeans, pecans and peanuts. Oklahoma is one of the most diverse states in the nation.

There is a demand for many of these products throughout the United States and around the world. Crops are an important agricultural product in the state.

Wheat

Hard red winter wheat is one of Oklahoma's major crops. The state rank's high in the production of hard red winter wheat and in production of all wheat. Oklahoma exports much of its wheat. Primarily grown in the western section of the state, hard red winter wheat is a leader in value and production.

Soybeans

The soybean, grown mostly in eastern Oklahoma, is one of the state's most versatile crops. Soybeans are currently used domestically and as an export product for use as a meat substitute, a livestock feed, for some industrial purposes, and for various condiments.

Alfalfa Seed

Alfalfa seed is grown in the central section of the state. Although it is not ranked as high as other crops within the sate in production, alfalfa seed is an important crop for Oklahoma farmers.

Cotton

Grown in the western and southwestern sections of the state, it is a large export crop. Most of the cotton is short stemmed and is primarily used for industrial purposes.

Milo

The majority of milo is grown in the Panhandle, western and some northern sections of the state.

Forestry

The forest industry is a large contributor to the economy. The industry is responsible for thousands of jobs in the manufacturing plants within the state. The industry has a substantial growing stock and plants many new trees annually. This activity, as well as many other conservation actions, will allow the forest products industry to remain an important part of Oklahoma agriculture.

Pecans

Pecans are found throughout the eastern section of Oklahoma. Two varieties, native and paper shell, are used domestically, with only a small export market at the present time.

Corn

Corn is primarily grown in Oklahoma for use within the state as feed for the beef cattle feedlots.

Peanuts

Peanuts are grown mainly in the southeastern and south central sections of Oklahoma. Oklahoma exports a large percentage of this crop.

INFORMATION SHEET

INTRODUCTION TO AGRICULTURAL SALES AND SERVICE

I

OBJECTIVE 1

Match terms associated with agricultural occupations to their correct definitions.

- **Agribusiness**—Firm or economic enterprise organized to produce and sell services and supplies to farmers for use in farm production and farm living
- **Agricultural communications**—Communication of agricultural information through radio and television, advertising, public relations and publications
- **Agricultural economics**—Agricultural business and marketing, accounting, farm and ranch management, community development, farm finance, and farm policy
- **Agricultural education**—Education for teaching vocational agriculture, agriculture extension, foreign service and government service
- **Agricultural engineering**—Power, machines, structures, electricity and processing, soil and water conservation and the many other applications of engineering to agriculture
- **Agriculture production**—Science or art of cultivating the soil, producing crops, raising livestock, and all other aspects of preparing these products to move from producer to consumer
- **Agronomy**—Crops and soils, their relationships, use, management and adaptation, including range management
- **Career**—The continued progress in the life work of a person through a series of related occupations or activities
- **Custom farm/ranch work**—Refers to work that is performed on the farm by an independent contractor; may be seasonal and require expensive equipment

  EXAMPLES: Painting a barn or harvesting wheat
- **Entomology**—The scientific study of the biology, structure, behavior, classification, and control of insects
- **Forestry**—Management of forest resources, including timber, recreation, wildlife, watersheds and grazing

- **Horticulture and landscape architecture**—Floriculture (study of flowers), landscape architecture, the development and maintenance of areas for use, convenience and enjoyment, vegetable, fruit and nut crops culture, and nursery production

- **Job**—Group of similar positions in a work situation

  NOTE: There may be only one or there may be many persons employed in the same job. Teaching agricultural education in your school is an example of a job.

- **Occupation**—Group of similar jobs

  EXAMPLE: Secondary school teaching

- **Qualifications**—Experience, education, and physical characteristics which suit a person to a job

- **Selling**—The process of determining the needs and wants of a customer and presenting a product or service in such a way that the customer is motivated to make a favorable buying decision

- **Trade association journals**—Publications printed by various nonprofit organizations to disseminate information about an industry

OBJECTIVE 2

List occupations available in agricultural sales and service. (Activity Sheets 1 and 2)

There are many people employed in agriculture in the United States. One out of every five jobs in private employment is related to agriculture. About 22 million workers, in addition to 3 million directly engaged in farming, earn their living from the agricultural industry.

The jobs available in the agricultural industry are diverse and vary from area to area. The type of agriculture predominant in an area will determine to a large extent the types of jobs available in that area. Below are some of the major occupations in agriculture.

Sales

Agricultural sales encompasses many different products, from selling combines to selling feed. Many times a salesperson will sell more than one type of product. Sales impacts every area of agriculture, either by relying on sales or by purchasing products.

The opportunities in sales are as diverse as the agriculture industry. Listed below are some of the more common sales opportunities.

- Farm equipment sales—Heavy equipment such as tractors, combines, balers, etc. Also smaller equipment such as lawn mowers, tillers, lawn and garden tractors, etc. Most positions are with dealerships. But there are jobs with companies that service and repair equipment or with farm equipment manufacturers or distributors.

- Feed, seed, and grain sales—Supplying farmers with high-quality seeds as well as feed for livestock/poultry. Most jobs are with supply stores and companies that process and distribute feed, seed, and grain. Larger companies may sell to both wholesalers and retailers. An example would be a feed and grain products person.

- Chemical sales—Fertilizers, pesticides, and herbicides. Most jobs are with farm supply stores or chemical manufacturers. Examples of some jobs in this category would be scout, weed inspector, and exterminator supervisor.

- Horticulture/nursery sales—Plants, shrubs, trees or turf. Jobs are available with retail stores and also wholesale nurseries.

Service

Agriculture service refers to providing customers with something other than a physical product. Repairing equipment, custom harvesting, or veterinary care are examples of services. Listed below are some examples of services.

- Farm equipment mechanics—Servicing and repairing equipment. Most jobs are in large shops or with dealerships. Examples of some jobs in the category would be service salesperson, milking machine; tractor mechanic; tractor mechanic helper; farm equipment mechanic I, II or apprentice.

- Service managers—May be employed by a dealership or repair shop to supervise both the repair/service and parts department.

- Custom work—Some of the more common types of custom work are crop duster, wheat harvesting, and hay baling. Many people who do custom work are self-employed.

- Food processing field agents—Buy crops and livestock for processing and packaging firms. They may also inspect fruit, vegetable and other produce for their firms. Examples of the jobs in this category would be livestock buyer; field-contact person; buyer, agriculture produce; and buyer, grain.
- Field representatives—Work for farmers, growers, and cooperatives. They ensure produce is ready for shipment and make arrangements for shipment.

Other occupations

There are also many opportunities in agriculture that are related to sales and service and may overlap one or both of these. Many of these jobs are supportive to either sales or services. These jobs range from working in a processing plant to being a manager of an elevator.

- **Agricultural technicians**—Refers to a wide variety of jobs available in agriculture. Jobs may be with companies that process and store seed, feed, and grain, processing plants, warehouses, grain elevators, or cooperative extension service agencies. Jobs are also available with state, federal and international agencies that deal with agriculture and perform such duties as inspecting crops and bringing modern farming techniques to farmers in the United States and foreign countries. Some examples of jobs in this category are artificial breeding technician, poultry technician, poultry technical advisor, watermelon inspector, brand inspector, etc.
- **Professional, technical, and managerial occupations**—There are many opportunities available in these types of jobs. But many of the jobs in this category will require a college degree, such as agricultural engineering or veterinary medicine. In others a college degree is not essential but because of competitive job markets is beneficial, such as agricultural communications or agriculture business manager. Examples of other jobs in this category would be commodity broker, agricultural extension agent, 4-H club agent, and landscape architecture.

OBJECTIVE 3

List the skills required to be employed in agricultural sales and service occupations.

In order to be successful at any job certain basic skills are required and agricultural sales and service occupations are no exception. In addition to basic skills certain technical skills may also be required for a job. Listed below are skills that are necessary in agricultural sales and service.

- Planning
- Organizing
- Analyzing
- Problem solving
- Decision making
- Communication, both oral and written
- Mathematics
- Interpersonal skills (human relations)
- Record keeping
- Business machines
- Technical/special skills such as machinery operation, hand tools, computer, selling, surveying, accounting, etc.

OBJECTIVE 4

Discuss training requirements and advancement possibilities for careers in agricultural sales and service.

There are many factors that affect a person's ability to enter a certain field of employment. **Formal education** and "hands-on" **experience** are two of the most important factors. The **area** and **field of employment** will also affect a person's ability to enter a certain field. For example, employment with a large chemical supply company in a city may require a bachelor's degree but an employer hiring a ranch manager may look more at "hands-on" experience and knowledge.

Advancement possibilities are also determined by many different factors. **Formal education, experience, size of organization**, and **employee performance** are some important factors that affect advancement possibilities. For example, a salesperson who is outstanding may advance to a sales manager.

In some fields, **experience and education can counter each other**. A person who does not have a college degree but has several years experience can compete for jobs with people who have a college degree but little experience.

An important factor in both entering a field and advancing in a field is **initiative**. Initiative is essential if a person is to be successful in the work place.

Another important factor is **flexibility**. A person must be willing to do such things as work overtime, receive additional training, or change jobs in order to be successful in the work place.

OBJECTIVE 5 **List steps and strategies of career decision making.**

Your career decision will affect all areas of your life. Many people do not choose the jobs they want - they take what is available at the time. Most people lack knowledge and planning skills when choosing careers.

You must make careful and logical decisions when choosing a career. The following steps can help in this process:

1. Define your future needs or wants.

   EXAMPLE: Where will you want to live, how much time do you want to devote to your job, how much travel, how much money will you need.

2. Analyze your resources.

   EXAMPLE: Your resources for choosing a career are the things that make you - interest, skills, personality.

3. Identify your choices.

   EXAMPLE: Pick several careers that you think might fulfill your needs and wants.

4. Gather information and compare choices.

   EXAMPLE: Find out about such things as job duties, job responsibilities, work relationships, required skills.

5. Evaluate choices.

   EXAMPLE: Review the information you have gathered and determine factors which match your interests and skills.

6. Make your decision.

   EXAMPLE: Decide which career fits your needs from the evaluation.

7. Plan how to reach your goal.

   EXAMPLE: Work toward this career decision.

34

8. Be alert.

   NOTE: Even though you have decided on a career, keep asking questions because job fields constantly change.

9. Have a plan of action.

10. Evaluate.

    NOTE: Continue this ongoing process to determine if your chosen career is fulfilling your needs.

11. Start over.

    NOTE: If your needs are not being fulfilled, go back until you see some progress.

OBJECTIVE 6

Match terms associated with employee compensation and benefits to their correct definitions.

- **Annual Leave**—Compensated vacation time (accumulated)
- **Commission**—Incentive payment reflecting a certain percentage of total sales of salesperson
- **Deduction**—Money that employer holds back from paycheck
- **Gross Pay**—Total wages or salary before deductions
- **Holiday Leave**—Compensated time away from work for legal holidays or other days employer designates
- **Hourly wage**—Money paid by the hour
- **Insurance**—Financial protection against possible illness, injury, death, or disability of worker. Usually offered at a group rate to employees by the company
- **Net Pay**—Total wages or salary after deductions
- **Overtime wages (Time-and-a-half)**—A payment of 1 1/2 times the employee's regular hourly rate for all hours worked in excess of 40 in any one work week; required by the Fair Labor Standards Act of 1938.

  NOTE: Some managerial and professional jobs are exempt from the overtime provisions of the law.
- **Profit-sharing**—A system allowing employees to share in a company's financial profits through cash bonuses or purchase of company stock

- **Retirement (Group Pension Plans)**—Accumulated funds paid to employees concluding work careers

- **Sick Leave**—Compensated time off work for illness or injury

- **Straight salary**—Fixed amount of money paid by the week or month, regardless of hours

- **Unemployment compensation**—Money paid out of a state-regulated payroll tax fund to laid-off workers and charged against an employers account

- **Worker's Compensation**—Insurance benefits for workers injured on the job, paid for through an employer's payroll taxes

OBJECTIVE 7

Distinguish among payroll deductions.
(Transparency Masters 1 through 4)

There are two types of payroll deductions: deductions required by law and deductions requested by employee. The amount of deductions requested by law that are withheld depend on your salary and the number of exemptions that you declare.

- Payroll deductions required by law.

  - **Social Security (Federal Insurance Contributions Act, or FICA)**

    Originated in 1935 as a federal retirement and disability insurance program, Social Security now also provides for health care payments under the Medicare bill of 1966. As in any insurance, Social Security depends on contributions (premiums) to provide benefits to its "policy-holders." The federal government collects the premiums monthly based on a percentage of the employer's payroll and employee's pay. FICA taxes have risen gradually since their inception to compensate for a decline in the taxable work force and a corresponding increase in retirees and others claiming benefits.

- **Federal income tax**

  The 16th Amendment to the U.S. Constitution (1913) created federal income taxes, collected annually and based on taxpayers' yearly income and exemptions. The federal withholding tax allows employers to deduct or withhold increments of the taxpayer's total annual taxes, based on projected income. Ideally, withholding permits the taxpayer to have paid all income taxes by the end of the year, making one large payment unnecessary.

- **State income tax**

  Similar to federal income taxes, state income taxes are based on taxpayer's yearly income and exemptions, and are also payable through a withholding system.

- **City income tax**

  Many cities also levy an income tax, based on either a percentage of income or a percentage of state income taxes.

- Payroll deductions requested by employee
  - **Company insurance**
  - **Company retirement plans**
  - **Labor union dues**
  - **Savings account credits**
  - **Tax shelters**

OBJECTIVE 8 **List benefits that employees may receive.**

The benefits that an employee receives will vary with the type of organization they work for. Larger organizations may be able to offer more benefits. When considering a job, benefits should be considered. For example, a job that pays slightly more than another job may not be as desirable it does not have as many benefits as the lesser paying job.

- **Insurance**
  - Health - Many companies provide health insurance which pays employees' and their dependents' medical expenses (often including major medical, hospitalization, surgical, pharmaceutical, and dental fees). Generally, under group medical plans, physical examinations are not required. An employee's health insurance premiums may be paid through payroll deductions, depending on company policy.
  - Life - Employees' dependents receive the amount of the policy upon his or her death. Premiums may be paid by the company and/or the employee.
- **Tax shelters**
  - Money deducted from paycheck and invested in stocks, bonds, or other securities, depending on type of plan. Interest compounds yearly; tax on interest becomes payable only when employee withdraws money.
- **Leaves from work**
  - Sick leave
  - Maternity leave
  - Annual leave
  - Holiday leave
- **Retirement** (group pension plans)
- **Profit-sharing programs**
- **Worker's Compensation**
- **Unemployment compensation**
- **Savings account credits**

ORGANIZING AN AGRIBUSINESS

INTRODUCTION

Many new businesses are formed each year. A business may range from a small one person operation to a large factory. Many considerations must be taken into account when forming a business. The legal considerations will vary depending upon the type of business and individual situation. Legal considerations include: (1) requirements for forming the organization, (2) sales tax requirements, (3) occupational licenses and permits, (4) zoning and other local restrictions and (5) considerations for businesses extending consumer credit.

Forming the Organization

Forms of organization include sole proprietorship, general partnership, limited partnership, corporation, and cooperative. Each type of organization has advantages and disadvantages. The sole proprietorship is the simplest form of organization, and there are no legal steps required to form the sole proprietorship.

Sales Tax Permits

Businesses engaged in selling goods or services that are subject to sales tax must comply with applicable state sales tax laws. Certain agricultural sales may be exempt from sales tax. Check with the appropriate agency in your state.

Occupational Licenses and Permits

Certain licenses and permits are required for various occupations. Check with an attorney and the appropriate agencies to help determine the requirements, if any, for your particular business. If your organization does business in other states, you should also check the requirements in those states.

Zoning and Other Local Restrictions

Communities often restrict the location of businesses through zoning ordinances. The zoning restrictions may include site plan review, set back restrictions, building height restrictions as well as use restrictions. Information concerning restrictions that apply to a particular piece of land can generally be obtained from the local planning department.

Consumer Credit

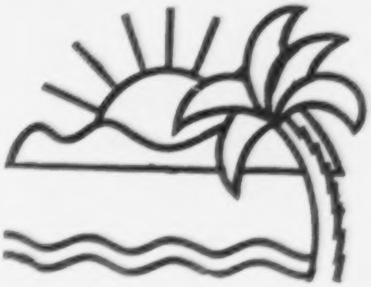
If the business involves consumer credit sales or leases, the business must comply with the consumer credit code. This act requires that certain disclosures be made to the consumer so he or she understands the credit arrangement. Federal Truth in Lending requirements must also be satisfied. If a business anticipates extending credit to consumers, an attorney should be consulted.

Other Considerations

Businesses that hire employees are subject to additional state and federal labor laws. If you decide to organize a business, you should consult an attorney who can help insure that you satisfy all of the legal requirements for your particular business.

Payroll Deductions Required By Law

Social Security



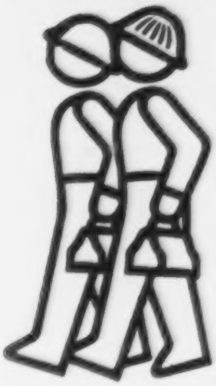
Federal Income Tax

State Income Tax

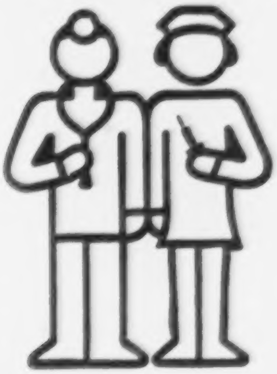
City Income Tax

Payroll Deductions Requested by Employer

Labor Union Dues



Group Insurance



Savings Account Credits

Payroll Deductions Requested by Employer

(Continued)

Tax Shelters

Retirement Plans

Sample Paycheck

FRENCH FASHIONS NO. 317

Total Hours	You Earned and We Paid			Total	We Paid These Amounts			Balance of Earning	Period Ending	No.
	Regular	Overtime	Other		F.I.C.A.	Withhold Inc. Tax	Union Dues			
42	153 30	6 40		159 70	17 00	30 00		112 70	2/7	348

PAY STATEMENT - - - Detach and Retain

Pay Roll
Check

FRENCH FASHIONS
Trenton, New Jersey

NO. 317

$\frac{00.000}{000}$

PAY
TO THE ORDER OF Sue Wood 2/17 19

One hundred, twelve, $\frac{70}{100}$ - $ 112.70 - - -

EWING TRUST COMPNAY
TRENTON, NEW JERSEY

FRENCH FASHIONS

John R. French

WHAT IS AGRICULTURE?

INTRODUCTION

Agriculture is composed of many different areas such as crops and livestock. A farmer may grow many different crops or only one crop such as wheat or corn. The same applies to livestock; a rancher may have only beef cattle, horses, or sheep or may have several different animals.

DIRECTIONS

Part I

Write down as many agricultural related items under the categories *crops*, *livestock*, and *other* that you can think of.

Part II

After you have finished, choose one agribusiness or commodity from Part I and write down examples of the sales and services that are related to your choice. For example, beef cattle need feed (sales) or wheat may need custom harvesting (service). Discuss with other students.

Part I

CROPS	*LIVESTOCK*	*OTHER*
• ______________	• ______________	• ______________
• ______________	• ______________	• ______________
• ______________	• ______________	• ______________
• ______________	• ______________	• ______________
• ______________	• ______________	• ______________
• ______________	• ______________	• ______________
• ______________	• ______________	• ______________
• ______________	• ______________	• ______________

Part II

SALES	*SERVICE*
• ____________	• ____________
• ____________	• ____________
• ____________	• ____________
• ____________	• ____________
• ____________	• ____________
• ____________	• ____________
• ____________	• ____________

ACTIVITY SHEET 2

INTRODUCTION TO AGRICULTURAL SALES AND SERVICE

I

NONTRADITIONAL AGRICULTURAL CAREERS

INTRODUCTION

Certain opportunities in agriculture may be hard to recognize because they are not traditional agricultural occupations. Catfish farming or raising alternative crops such as herbs are examples.

DIRECTIONS

Survey agricultural businesses in your area for examples of nontraditional agricultural occupations. Also, read newspapers and articles for examples of nontraditional occupations. Try to find five examples of nontraditional careers and write them in the spaces below.

1. ____________________

2. ____________________

3. ____________________

4. ____________________

5. ____________________

NAME ______________________________ SCORE ________

OBJECTIVE 9

Search newspapers or trade journals for job opportunities in agricultural sales and service.

1. Find three job opportunities listed in the newspaper or a trade journal that you could apply for after graduation. Copy the ads in the space below.

   a. ____

   ____

   ____

   ____

   b. ____

   ____

   ____

   ____

   c. ____

   ____

   ____

   ____

2. In the blanks provided write either "A", "B", "C" to designate which of the ads above answers the following questions. If none of the ads applies write "0". You may write more than one letter in the blank.

   Which ad . . .

   _____ a. has the greatest appeal to you?

   _____ b. states specific educational requirements?

   _____ c. asks for previous experience?

   _____ d. indicates they will train you?

______e. states a need for mechanical experience?

______ farm experience?

______f. requests a resume?

______g. requests the applicant must apply in person?

______ must call for an appointment

______h. states that a current driver's license is needed?

______ i. states there is an employment fee involved?

______ fee paid?

______ j. was placed by a firm outside the state of Oklahoma?

______k. indicates there is an opportunity for advancement?

______ company growth?

______ l. indicates rate of pay?

______ commissions

______ bonuses?

_____ m. indicates benefits?

______n. states working conditions?

ASSIGNMENT SHEET 2

INTRODUCTION TO AGRICULTURAL SALES AND SERVICE

I

NAME ______________________________ SCORE _______

OBJECTIVE 10

Survey agricultural sales and service occupations in your area.

INTRODUCTION

You are enrolled in a course of study that can provide you with an interesting, rewarding career. The agricultural sales and service field is full of opportunities for qualified people. The field offers a wide variety of jobs involving various skills and working conditions.

The purpose of this assignment sheet is to help you explore job opportunities and career choices in agricultural sales and service.

DIRECTIONS

1. Select three occupations you are interested in exploring.
2. Interview at least two people from each of the occupations selected. Use the Survey Questionnaire as a guide and to record your findings.
3. Repeat this selection and interview process until you are able to narrow your choice of an occupational objective to one occupation. Your decisions should be based on a knowledge and understanding of several career areas.
4. Relate the classroom topics, individual studies, FFA activities and on-the-job training to your occupational objective.
5. Upon completion of the Survey Questionnaires, answer the following questions. These should help you when planning your individual studies.

- List the textbooks, magazines, trade journals and individual study materials related to your occupational objective.

____

____

____

____

- What businesses can you visit individually or on a class field trip to learn more about your choice of an occupation?

____

____

____

____

- What other people could you talk to or invite to speak to the class or FFA chapter about your occupational objective?

____

____

____

____

- List some goals which you plan to accomplish during this grading period that will further prepare you for your career objective?

____

____

____

____

Discuss these with your instructor. At the end of each grading period review your accomplishments and make necessary adjustments. Also set your learning goals for the next grading period.

NAME ____________________

SURVEY QUESTIONNAIRE

Name of person interviewed: ____________________

Name of company: ____________________ Date: __________

1. What career field (or job titles) did you discuss? __________

   ____

2. What is the typical entry level position for this career? _____

   ____

3. What are the duties and responsibilities? __________

   ____

   ____

4. What are the entry level requirements? __________

   Skills? ____________________

   ____

   Education? ____________________

   ____

   Experience? ____________________

   ____

5. What are the working conditions (hours, days per week, travel, customer contact, inside or outside, etc.) __________

   ____

6. What do you need to do further to prepare yourself for this career field? ____________________

   ____

7. What are the opportunities for growth and advancement?

   Short range? ____________________

   Long range? ____________________

   ____

8. What is the employment outlook in this career field.

Now? ______________________________

Future? ______________________________

9. What are some things that could affect this career field in the future? ______________________________

10. What income should you expect to earn?

Beginning? ______________________________

Long range? ______________________________

11. What benefits are generally provided? ______________________________

12. Who else should you be talking with to learn more about this career field? ______________________________

Companies? ______________________________

Books, trade journals, materials, etc., you should be studying?

____

54

ASSIGNMENT ANSWERS — INTRODUCTION TO AGRICULTURAL SALES AND SERVICE — I

ASSIGNMENT SHEET 1

Check to see that students have found three different newspaper/trade journal ad and have answered each question with either A, B, C, O or a combination of letters.

ASSIGNMENT SHEET 2

Check to see that the student has completed all six interviews and has recorded his or her findings. Also review the student's learning goal for the next grading period and make appropriate suggestions/adjustments. Then follow-up to ensure the learning is taking place.

WRITTEN TEST

INTRODUCTION TO AGRICULTURAL SALES AND SERVICE

I

OBJECTIVE 1

Match terms associated with agricultural occupations to their correct definitions. Write the correct letters in the blanks.

____ 1. The scientific study of the biology structure, behavior classification, and control of insects

____ 2. Publications printed by various nonprofit organizations to disseminate information about an industry

____ 3. Group of similar jobs

____ 4. Firm or economic enterprise organized to produce and sell services and supplies to farmers for use in farm production and farm living

____ 5. Management of forest resources, including timber, recreation, wildlife, watersheds and grazing

____ 6. Crops and soils, their relationships, use, management and adaptation, including range management

____ 7. Group of similar positions in a work situation

____ 8. Refers to work that is performed on the farm by an independent contractor; may be seasonal and require expensive equipment

____ 9. The continued progress in the life work of a person through a series of related occupations or activities

____ 10. Experience, education, and physical characteristics which suit a person to a job

____ 11. Communication of agricultural information through radio and television, advertising, public relations and publications

a. Agricultural production
b. Job
c. Agronomy
d. Agribusiness
e. Title
f. Agricultural economics
g. Career
h. Forestry
i. Agricultural education
j. Agricultural management
k. Occupation
l. Farm equipment
m. Horticulture and landscape architecture
n. Agricultural communications
o. Custom farm/ranch work
p. Soil conservation
q. Agricultural engineering
r. Entomology
s. Range management

___12. Science or art of cultivating the soil, producing crops, raising livestock, and all other aspects of preparing these products to move from producer to consumer

___13. The process of determining the needs and wants of a customer and presenting a product or service in such a way that the customer is motivated to make a favorable buying decision

___14. Floriculture (study of flowers), landscape architecture, the development and maintenance of areas for use, convenience and enjoyment, vegetable, fruit and nut crops culture, and nursery production

___15. Agricultural business and marketing, accounting, farm and ranch management, community development, farm finance, and farm policy

___16. Power, machines, structures, electricity and processing, soil and water conservation and the many other applications of engineering to agriculture

___17. Education for teaching vocational agriculture, agriculture extension, foreign service and government service

t. Qualifications

u. Breed magazines

v. Selling

w. Trade association journals

x. Agricultural media

y. Insectology

z. Resume

OBJECTIVE 2 **List occupations available in agricultural sales and service.** Write two jobs under each category.

Sales ____

____

Service ____

____

Agricultural Technicians ____

____

Professional, technical, and managerial occupations

____

____

OBJECTIVE 3 **List the skills required to be employed in agricultural sales and service occupations.** Write five skills in the space provided.

____

____

____

____

____

OBJECTIVE 4 **Discuss training requirements and advancement possibilities for careers in agricultural sales and service.**

____

____

____

____

____

____

____

OBJECTIVE 5 **List steps and strategies of career decision making.**

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________
11. ______________________________

OBJECTIVE 6

Match terms associated with employee compensation and benefits to their correct definitions. Write the correct letters in the blanks.

____1. Money that employer holds back from paycheck

____2. Money paid by the hour

____3. Fixed amount of money paid by the week or month, regardless of hours

____4. Incentive payment reflecting a certain percentage of total sales of salesperson

____5. A payment of 1 1/2 times the employee's regular hourly rate for all hours worked in excess of 40 in any one work week

____6. Financial protection against possible illness, injury, death or disability of a worker

____7. Compensated time off work for illness or injury

____8. Compensated vacation time

____9. Compensated time away from work for legal holidays or other days employer designates

____10. Insurance benefits for workers injured on the job, paid for through an employer's payroll taxes

____11. Accumulated funds paid to employees concluding work careers

____12. A system allowing employees to share in a company's financial profits through cash bonuses or purchase of company stock

____13. Money paid out of a state-regulated payroll tax fund to laid-off workers and charged against an employers account

____14. Total wages or salary before deductions

____15. Total wages or salary after deductions

a. Straight salary
b. Bonus
c. Annual leave
d. Retirement
e. Total pay
f. Insurance
g. Unemployment compensation
h. Holiday leave
i. Disability
j. Earnings
k. Commission
l. Profit-sharing
m. Overtime wages
n. Medical leave
o. Deduction
p. Vacation
q. Sick leave
r. Gross pay
s. Net pay
t. Compensation
u. Worker's Compensation
v. Hourly wage

OBJECTIVE 7 **Distinguish among payroll deductions.** Write an "R" in the blank before the deduction required by law and an "E" in the blank before the deduction made at the employee's request.

____ 1. Social Security/FICA

____ 2. Company insurance

____ 3. Tax shelters

____ 4. State and/or city income tax

____ 5. Labor union dues

____ 6. Company retirement plans

____ 7. Savings account credits

____ 8. Federal income tax

OBJECTIVE 8 **List benefits that employees may receive.** Write five benefits in the space provided.

____

____

____

____

____

NOTICE The following assignment sheets are not part of the written test. If these activities have not been completed, check with your instructor.

OBJECTIVE 9 **Search newspapers or trade journals for job opportunities in agricultural sales and service.** SCORE ______

OBJECTIVE 10 **Survey agricultural sales and service occupations in your area.** SCORE ______

WRITTEN TEST ANSWERS

INTRODUCTION TO AGRICULTURAL SALES AND SERVICE

I

OBJECTIVE 1

1. r
2. w
3. k
4. d
5. h
6. c
7. b
8. o
9. g
10. t
11. n
12. a
13. v
14. m
15. f
16. g
17. i

OBJECTIVE 2

Answer should include any two from each category. Students may have other answers that are acceptable.

- Sales
  - — farm equipment sales; feed, seed, and grain sales; chemical sales; horticulture/nursery sales
- Service
  - — farm equipment mechanics; service managers; custom work; food processing field agents; field representatives
- Agricultural technicians
  - — artificial breeding technician; poultry technician; poultry technical advisor; watermelon inspector; brand inspector
- Professional, technical, and managerial
  - — agricultural engineering; veterinary medicine; agricultural communications; business manager; commodity broker; agricultural extension agent; 4-H club agent; landscape architecture

OBJECTIVE 3

Answer should include any five of the following:

- Planning
- Organizing
- Analyzing
- Problem solving
- Decision making
- Communication, both oral and written
- Mathematics
- Interpersonal skills (human relations)
- Record keeping
- Business machines
- Technical/special skills

OBJECTIVE 4

Answer should include the following key points:

- Some important factors that affect a person's ability to enter a certain field of employment are formal education, experience, area and field of employment.
- Some factors that help determine advancement possibilities are formal education, experience, size of organization, and employee performance.
- Experience and education can counter each other.
- Initiative and flexibility are important in both entering and advancing in a field.

OBJECTIVE 5

1. Define your future needs or wants
2. Analyze your resources
3. Identify your choices
4. Gather information and compare choices
5. Evaluate choices
6. Make your decision

7. Plan how to reach your goal
8. Be alert
9. Have a plan of action
10. Evaluate
11. Start over

OBJECTIVE 6

1. o
2. v
3. a
4. k
5. m
6. f
7. q
8. c
9. h
10. u
11. d
12. l
13. g
14. r
15. s

OBJECTIVE 7

1. R
2. E
3. E
4. R
5. E
6. E
7. E
8. R

OBJECTIVE 8

Answer should include any five of the following:

- Health or medical insurance
- Life insurance
- Tax shelters
- Sick leave
- Maternity leave
- Annual leave
- Holiday leave
- Retirement

- Profit-sharing programs
- Worker's Compensation
- Unemployment compensation
- Savings account credits

OBJECTIVE 9 Refer to answers to Assignment Sheet 1.

OBJECTIVE 10 Refer to answers to Assignment Sheet 2.

OBJECTIVE SHEET

PROVIDING FOR HEALTH AND SAFETY IN THE WORKPLACE

II

INTRODUCTION

Accidents and injuries on the job don't just happen. They are the result of unsafe acts or conditions. Sometimes employees are careless. Sometimes the supervisor hasn't given proper instructions. Sometimes employer attitudes are to blame. Sometimes the manager hasn't helped employees to understand the dangers involved in their work. Sometimes equipment fails. Sometimes machines are not properly guarded. But there is *always* a person who could have prevented the accident by taking proper protective or control action.

In order for you to prevent accidents and injuries, it is important to become familiar with general safety practices, fire safety techniques, proper methods of lifting and carrying, etc. This knowledge will benefit both you and your employer through fewer accidents and a more productive business.

UNIT OBJECTIVE

After completing this unit, the student should be able to determine general safety practices, know the safety color code, and know which fire extinguishers are suitable for various classes of fire. The student will practice proper lifting techniques, and know general precautions for working with hazardous materials. The student will demonstrate these competencies by completing the assignment sheets, job sheet, and written test with a minimum of 100 percent accuracy.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to

1. Match terms associated with general safety practices to their correct definitions.
2. State reasons why safety practices and procedures are needed.
3. State general job safety rules.
4. Distinguish between colors of the safety color code and their correct applications.
5. Name the components of the fire triangle.
6. Match classes of fires to their correct descriptions.
7. Match pictorial lables of fire extinguishers to the class of fire for which each is used.
8. Arrange in order procedures used to correctly lift a heavy object.

9. List items to consider when planning emergency evacuation procedures.

10. List the purposes of the Occupational Safety and Health Administration.

11. Select from a list features of worker's compensation insurance.

12. Discuss how hazardous materials enter the body and precautions which should be taken.

13. List symptoms of pesticide poisoning.

14. List steps to prevent misuse of pesticides.

15. List guidelines for pesticide safety.

16, Name information found on a pesticide label.

17. Analyze situations to determine correct safety practices. (Assignment Sheet 1)

18. Determine colors used in the safety color code from given situations. (Assignment Sheet 2)

19. Determine correct fire extinguishers to use for various classes of fires. (Assignment Sheet 3)

20. Demonstrate the ability to properly lift a heavy object. (Job Sheet 1)

66

SUGGESTED ACTIVITIES | PROVIDING FOR HEALTH AND SAFETY IN THE WORKPLACE II

PREPARATION

- Obtain materials to supplement unit.

  NOTE: See Suggested Resources.

- Review instructional outline for this unit. Modify time frames to suit class needs and plan activities for each class period.

- Study the specific objectives to determine those you will cover in your presentation. Decide also which objectives should be taught to which students.

- Determine scope and sequence of objectives that you add. Design and develop support materials, including evaluation techniques, for additional objectives.

- Determine how you will schedule time for students to demonstrate competence in the required procedures.

- Make arrangements for guest speakers. Supply speakers with specific objectives and other appropriate sections of the unit.

- Prepare classroom.

  - Put up posters, charts, etc., dealing with general safety practices.

  - Have articles, brochures, and other literature dealing with accidents and injuries and the importance of general safety practices available for students to read.

DELIVERY

Objective 1

- Discuss terms and definitions. If possible, use examples to illustrate the terms.

- Survey the class to find out their knowledge of general safety practices and their perceptions regarding the need for both personal and business safety practices. Find out if students have ever been in a work related accident or worked in a store in which an accident occurred. If so, ask students what practices were used and how the situation could have been prevented.

- Provide students with the latest injury and death statistics for job-related accidents. If possible, emphasize statistics in areas in which students expect to be employed.

  NOTE: See Teacher Supplement 1.

Objective 2

- Discuss the importance of safety practices with students. Point out that accidents or injuries can affect not only the business and the employees involved, but also their families and others.

- Collect articles about actual accidents from newspapers or magazines. Write out questions over the articles for students to answer. Discuss with students how an accident could have been prevented, consequences to victim and victim's family, etc. Emphasize that accidents are something everyone thinks happen to someone else, but they can happen to anyone.

Objective 3

- Invite safety experts to discuss job safety rules. Use Transparency Masters 1 and 2 to discuss ladder safety. Provide students with Handout 1, if desired.

- Discuss the Occupational Safety and Health Administration (OSHA) and other regulatory acts and agencies.

- If possible, demonstrate safe use of the equipment students may encounter on the job. Discuss emergency procedures such as fire evacuation, adverse weather procedures, etc.

  NOTE: Refer to community or employer guidelines for procedures for disasters such as tornadoes, earthquakes, or hurricanes which may occur in your area.

- Describe safe dress for shop areas, and demonstrate the dangers of improper dress. For instance, show how dangling jewelry could contact machinery, how long hair can snag in machinery or parts, how loose clothing can get caught in machinery or fans, etc.

- Discuss the dangers of practical jokes and horseplay.

- Discuss storage locations and the importance of an organized work area.

- Discuss aisles, exits, and traffic areas. Emphasize the need for keeping them clear at all times.

- Show one or more of the following videos:

  - *Electrical Safety*
  - *Slips and Falls*
  - *Hand Safety*
  - *Eye Safety*

- Have students complete Assignment Sheet 1.

Objective 4

- Discuss the use of the safety color code and how it is used in shops in your training facility. Discuss labeling of defective equipment.

- Find out if any students are color blind, and offer them special assistance in identifying color code applications.

- Take students on a field trip to the shop area at a local business to observe how equipment and locations are marked according to the safety color code.

- Have students complete Assignment Sheet 2.

Objective 5

- Invite a representative from a local fire department to discuss how the components of the fire triangle interact to create a fire.

Objective 6

- Have a representative from a local fire department discuss classes of fires and examples of each.

- Display posters dealing with classes of fires or obtain brochures about classes of fires.

Objective 7

- Use Transparency Masters 3, 4 and 5 to discuss fire extinguisher labeling and classes of fire for which each is used. Provide students with Handout 2, if desired.

- Show one or more of the following videos:

  - *Safety on the Job: Fire Extinguishers*
  - *Portable Fire Extinguishers*

- Invite a firefighter to discuss fires and to demonstrate the use of fire extinguishers. Emphasize that the wrong fire extinguisher or the right one used improperly can actually make a fire worse. Have speaker discuss fire alarm, notification, and evacuation procedures.

- Have students complete Assignment Sheet 3.

Objective 8

- Show one or more of the following videos:

  - *Minimizing Back Strain on the Job*
  - *Preventing Back Injuries*

- Demonstrate the correct lifting procedure to students or videotape your own demonstration of procedure.

- Have a doctor or nurse discuss the possible consequences of incorrect lifting.

- Have students complete Job Sheet 1. Give practical test.

Objective 9

- Devise an evacuation plan for your classroom in the event of an emergency. Have students practice the plan. Discuss the importance of having more than one "getaway path" in case one is blocked. Emphasize the importance of remaining calm.

- Obtain evacuation procedures from your school or community for adverse weather conditions such as tornadoes, earthquakes, or hurricanes. Review safety guidelines with students for types of disasters which may occur in your area.

- Provide students with Handout 3, if desired.

Objective 10

- Discuss the Occupational Safety and Health Act with students. Obtain current OSHA forms and requirements from your Department of Labor area office and provide students with copies.

70

- Stress that the government provides for minimum requirements only, and that supervisors are responsible for seeing that their employees have a safe and healthful environment and wear personal protective devices when necessary. For example, if a supervisor does not enforce the use of ear protectors in a situation where there is no engineering way to reduce noise, the supervisor can be cited and the company penalized by the Department of Labor.

Objective 11

- Explain worker's compensation insurance. Have a benefits specialist or other guest speaker talk to the class.

Objective 12

- Contact the Department of Labor in your state for state regulations regarding hazardous materials. Provide copies to students or have copies available for reference.

- Invite a representative from a local shop or business to discuss with students their rights concerning working with hazardous materials. Have speaker provide students with examples of Material Safety Data Sheets and explain how they are used.

- Have students take a tour of a business or other facility which deals with hazardous materials and observe safety practices.

Objective 13

- Invite an expert in hazardous materials management to speak to the class about how they may come into contact with hazardous materials and ways to prevent exposure.

- Discuss agencies and hotlines to contact. See Teacher Supplements 2 and 3. Obtain other numbers or agency names that are in your area.

Objective 14

- Discuss symptoms of pesticide poisoning and appropriate responses.

- Discuss Supplement 1.

Objective 15

- Discuss proper storage, handling, and transporting of pesticides.

- Have a representative from a chemical or pesticide company speak to the class.

Objective 16

- Discuss information included on pesticide labels.
- Bring sample pesticide labels to class and discuss the information included on the labels.

APPLICATION

Objective 17

- Use Assignment Sheet 1 to give students practice in analyzing correct safety practices. Select a few of the better papers and discuss answers with entire class.

Objective 18

- Use Assignment Sheet 2 to give students practice in determining colors used in the safety color code for given situations.

Objective 19

- Use Assignment Sheet 3 to give students practice in determining correct fire extinguishers to use for various classes of fires.

Objective 20

- Use Job Sheet 1 to test student competency in lifting a heavy object.

EVALUATION

Practical Test

- Explain to students that they will be asked to demonstrate procedures on the job sheet to complete the practical test.
- Describe the rating scale used on the practical test.
- Give practical test.
- Reteach and retest as necessary.

Written Test

- Explain to students that they will be asked to demonstrate on the written test actions listed in the specific objectives.

- Give written test.

  NOTE: The written test may be given in sections if desired.

- Evaluate students on assignment sheet activities if not previously done.
- Reteach and retest if necessary.
- Complete appropriate section of competency profiles.
- Review individual and group performance in order to evaluate teaching methods. Adjust scope, sequence, or instructional approaches for additional lessons as required.

SUGGESTED RESOURCES

Audiovisual Materials

- *Safety on the Job: Fire Extinguishers*, Color, 23 minutes, 1/2-inch VHS, Aims Media, Inc., 1988. Available from Aims Media, Inc., 6901 Woodley Ave., Van Nuys, CA 91406, (800-367-2467).
- *Emergency Priorities.* 1/2" video, 24 minutes, 1987. Tel-A-Train, Inc., P.O. Box 4752, 309 N. Market St., Chattanooga, TN 37405.
- *Electrical Safety.* 1/2" video, 29 minutes, 1988. Tel-A-Train, Inc., P.O. Box 4752, 309 N. Market St., Chattanooga, TN 37405.
- *Slips and Falls.* 1/2" video, 24 minutes, 1984. Tel-A-Train, Inc., P.O. Box 4752, 309 N. Market St., Chattanooga, TN 37405.
- *Minimizing Back Strain on the Job.* 1/2" video, 25 minutes, 1984. Tel-A-Train, Inc., P.O. Box 4752, 309 N. Market St., Chattanooga, TN 37405.
- *Preventing Back Injuries.* 1/2" video, 24 minutes, 1987. Aims Instructional Media, 6901 Woodly Ave., Van Nuys, CA 91406-4878.
- *Portable Fire Extinguishers.* 1/2" video, 26 minutes, 1984. Tel-A-Train, Inc., P.O. Box 4752, 309 N. Market St., Chattanooga, TN 37405.

- *Hand Safety.* 1/2" video, 18 minutes, 1987. Tel-A-Train, Inc., P.O. Box 4752, 309 N. Market St., Chattanooga, TN 37405.

NOTE: The above videos are available to Oklahoma teachers on a free-loan basis. Oklahoma teachers may order these videos from the Oklahoma Department of Vocational and Technical Education, Resource Center, ATTN: Instructional Media Specialist, 1500 West Seventh Avenue, Stillwater, OK 74074, phone 1-800-522-5810. Out-of-state teachers must order from the addresses listed with each video.

Publications

- *Accident Prevention Manual for Industrial Operations—Administration and Programs*, 8th ed., National Safety Council, Chicago, Illinois, 1983.
- *Hazard Communications Training for Employers*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1987.
- Catalog of safety signs, tags, decals, etc. Carlton Industries, Inc., P.O. Box 280, La Grange, TX 78945, 1989.
- *BLR Catalog of Information Services*, Business & Legal Reports, 64 Wall Street, Madison, CT 06443-1513, 1989. Training films and booklets dealing with safety and hazardous waste/materials topics.
- Obtain booklets, pamphlets, posters, etc. from local agencies such as Department of Public Safety, Department of Agriculture and Department of Pollution Control.
- Obtain OSHA publications and fact sheets. Your OSHA regional or area office can provide you with a listing of current materials (OSHA Publications and Audiovisual Programs, OSHA 2019), or write: OSHA Publication Distribution, Room S-4203, Washington, DC 20210.

UNIT REFERENCES

- *Agricultural Supplies and Services*, Developed by Iowa State University of Science and Technology, Department of Agricultural Education, Ames, Iowa and the Department of Public Instruction, Des Moines, Iowa, 1981.
- Agricultural Pesticide Storage, OSU Extension Facts No. 7451, Oklahoma State University Cooperative Extension Service, Stillwater, Oklahoma, n.d.

- All About OSHA, U.S. Department of Labor, Occupational Safety and Health Administration, 1985.
- *Bricklaying Curriculum: Basic Core*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, and the Associated General Contractors of America, Stillwater, Oklahoma, 1983.
- Check Your Pesticide Labels, OSU Extension Facts No. 7454. Oklahoma State University Cooperative Extension Service, Stillwater, Oklahoma, n.d.
- First Aid for Pesticide Poisoning, OSU Extension Facts No. 7453. Oklahoma State University Cooperative Extension Service, Stillwater, Oklahoma, n.d.
- Hilgenberg, Gene, and Jane Huston, *Employment in Agribusiness*, Mid-America Vocational Curriculum Consortium, Inc., Stillwater, Oklahoma, 1984.
- Huston, Jane, *Personnel Security*, Mid-America Vocational Curriculum Consortium, Inc., Stillwater, Oklahoma, 1987.
- *Introduction to Automotive Service*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1989.
- McElroy, Frank E., *Accident Prevention Manual for Industrial Operations*, 8th edition, National Safety Council, Chicago, Illinois, 1980.
- *Oklahoma Oil and Hazardous Substances Pollution Contingency Plan*, Oklahoma Department of Pollution Control, P.O. Box 53504, 1000 N.E. Tenth Street, Room 1114, Oklahoma City, Oklahoma 73152, 1989.
- *Oklahoma Pesticide Applicators Law, Rules and Regulations*, Oklahoma Department of Agriculture, Plant Industry Division, 2800 North Lincoln, Oklahoma City, OK 73105.
- Safe Use of Pesticides in the Home and Garden, OSU Extension Facts No. 7450, Oklahoma State University Cooperative Extension Service, Stillwater, Oklahoma, n.d.
- *Safety On The Job: Some Guidelines for Working Safely*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1988.

- *Supervisor's Safety Manual*, 4th edition, National Safety Council, Chicago, Illinois, 1976.
- Toxicity of Pesticides, OSU Extension Facts No. 7457, Oklahoma state Univeristy Cooperative Extension Service, Stillwater, Oklahoma, n.d.
- 1990 OSU Extension Agents' Handbook of Insect, Plant Disease and Weed Control, Oklahoma State University Cooperative Extension Service, Stillwater, Oklahoma, 1990.

TEACHER SUPPLEMENT 1

PROVIDING FOR HEALTH AND SAFETY IN THE WORKPLACE

II

INTRODUCTION

Most accidents and injuries are caused by unsafe acts rather than by unsafe conditions. In accidents on the job, roughly four are caused by unsafe acts for every one caused by unsafe conditions. Here's the breakdown:

Cause of Accident

Mechanical failure (unsafe condition)	20%
Human failure (unsafe acts)	78%
Acts of nature (floods, storms)	2%

Unsafe Acts Checklist

- Operating without authority
- Failure to secure or tie down materials on a vehicle; shut doors; turn off power
- Failure to warn
- Operating at unsafe speeds
- Bypassing safety devices
- Using unsafe equipment
- Unsafe loading
- Unsafe placing of tools, equipment, or other materials
- Taking unsafe position or posture
- Working on dangerous or moving equipment

Unsafe Conditions Checklist

- Lack of guards
- Inadequate guards
- Defective equipment or materials
- Hazardous arrangements in work area
- Improper illumination

- Improper illumination

- Unsafe ventilation

Other Information

The Oklahoma Department of Labor, Information Services Division, publishes an annual report in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics which lists the occupational injuries and illnesses by industry in the private sector. Copies are generally available at your local library or by writing:

Oklahoma Department of Labor Information Services Division
4001 N. Lincoln Blvd.
Oklahoma City, Oklahoma 73105

Ask for most current:

Oklahoma Private Sector Economy Occupational Injuries and Illnesses by Industry, report.

PESTICIDE INFORMATION DIRECTORY

This directory is intended for use by persons who need assistance with general and emergency pesticide-related information. We hope that it will prove useful to you in directing you to the proper government and industry sources.

The directory is divided into EMERGENCY and GENERAL INFORMATION. The blank lines are provided to list local phone numbers for these sources. Take the time to fill in the blanks with the local numbers. It might save a life as well as save time and inconvenience. Keep a copy of this directory near your phone or in your service vehicle.

Emergency Information

POISONINGS	If poisoned have someone take you immediately to your nearest emergency room with the label of the container.	
Oklahoma Poison Information Center	Oklahoma Poison Control Center Oklahoma Children's Memorial Hospital P.O. Box 26307 Oklahoma City, OK 73126	405-271-5454 or 1-800-424-4611
SPILLS accidents and other related emergencies	CHEMTREC (for assistance) Chemical Transportation Emergency Center Industry assistance with clean up procedures, etc.	1-800-424-9300
SPILLS into water	NAITONAL RESPONSE CENTER reporting spills to comply with EPA regulations and the Clean Water Act	1-800-424-8802
MEDICAL INFORMATION	National Pesticide Telecommunications Network 24-hour medical consultation available on pesticide poisoning information.	1-800-858-7378
FOR ASSISTANCE WITH SPILLS AND EMERGENCIES take time to jot down your local emergency number in the space provided.	State police	
	Fire department	
	Ambulance	
For assistance in handling and meeting state reporting for pesticide related spills.	Waste Management Service Oklahoma State Department of Health	405-271-5338
	Pest management Section Oklahoma State Department of Agriculture	405-521-3864

DISPOSAL INFORMATION	**Waste Management Service Oklahoma State Department of Health Oklahoma City, OK**	**405-271-5338**
	Oklahoma State Department of Agriculture Plant Industry Division 2800 N. Lincoln Blvd. Oklahoma City, OK 73105	**405-521-3864**
GENERAL INFORMATION **except liscense or permit status and regulatory information**	**Your Local Cooperative Extension Service Office**	________________
	Pesticide Coordinator Department of Entomology Oklahoma State University Stillwater, OK 74078	**405-521-3864**
REGULATORY INFORMATION **license information including permit or**	**Oklahoma State Department of Agriculture Plant Industry Division 2800 N. Lincoln Blvd. Oklahoma City, OK 73105**	**405-521-3864**
INFORMATION ON PESTICIDES, TOXICOLOGY AND FEDERAL REGULATIONS	**National Pesticide Telecommunications Center (EPA Pesticide Information Clearinghouse)**	**1-800-858-7378**
POISONOUS MUSHROOM IDENTIFICATION	**Dr. K. E. Conway Department of Plant Pathology Oklahoma State University**	**405-744-5643** home **405-372-3667**
ANIMAL TOXICOLOGY HOTLINE	**University of Illinios Information and advice with known or suspected case of poisoning or chemical contamination in animals**	**217-333-3611 (24 hours/day) (7 days/week)**
EPA RCRA & SUPERFUND INDUSTRY ASSISTANCE HOTLINE	**Resource Conservation and Recovery Act and Superfund regulations assistance for those affected by these regulations, you may call for assistance with interpretation and compliance. EPA Small Business Hotline**	**1-800-424-9346 1-800-368-5888**
MSA HOTLINE	**Mine Safety Appliances Company for assistance in selecting and use of protective equipment (primarily respirators) and assistance in obtaining equipment in emergencies**	**1-800-MSA-2222 1-800-MSA-5555 (emergencies)**

Credit: 1990 OSU Extension Agents' Handbook of Insect, Plant Disease and Weed Control, Oklahoma State University Cooperative Extension Service, Stillwater, Oklahoma, 1990.

OKLAHOMA PRIVATE PESTICIDE APPLICATORS

WHAT IS A PRIVATE PESTICIDE APPLICATOR?

Private Applicator Category

This class includes any person who uses or supervises the use of any restricted use pesticide for purposes of producing any agricultural commodity on property owned or rented by the person or their employer or if applied without compensation other than trading of personal services between producers of agricultural commodities, on the property of another person. Private applicators are farmers, ranchers, growers, etc.

WHO CAN BECOME ONE?

Farmers
Greenhouse & Nursery Operations
Ranchers

WHO DOESN'T QUALIFY?

Maintenance Personnel
Home Gardeners
City Employees
Commercial Users
Researchers
Golf Course Employees

1. WHAT'S THE FIRST STEP?

Order a Private Applicator Study Packet from Oklahoma State University, Stillwater:

Central Mailing
Publishing & Printing East
Oklahoma State University
Stillwater, OK 74078

The cost is $10. Packets will not be sent without payments.

2. WHAT COMES NEXT?

You will receive a study packet containing the following materials:

1. Oklahoma State University cover letter

2. Oklahoma State Department of Agriculture cover letter
3. "Applying Pesticides Correctly" - study manual
4. Groundwater & Pesticide Information
5. Endangered Species Information
6. Furadan 4F label
7. Test Booklet
8. Answer Sheet
9. License Application Form
10. Addressed return envelope for sending answer sheet, application, and $5 to Oklahoma State Department of Agriculture for grading and processing.

Carefully read all materials supplied to you in this packet. It contains very important information and materials which will help you pass the test. When you are ready you can take the test in the comfort and convenience of your own home.

3. **THEN WHAT DO I DO?**

Send the completed answer sheet, application form, and $5 to the Oklahoma State Department of Agriculture to obtain your Private Pesticide Applicator's License. A return self-addressed envelope is provided in your packet for this purpose.

A score of 70% or better is required to pass the test. If you fail you will be sent a new answer sheet to re-test at no additional charge.

CARD INFORMATION

The Private Pesticide Applicator is issued a license in the form of an orange computer generated embossed plastic card. This card is not a license to perform commercial or noncommercial pesticide application work, nor will it allow you to purchase and/or use restricted use pesticides around a residence. The showing of this card may be necessary to purchase any restricted use pesticides.

Should you lose your card, there is a $5 replacement charge.

RECERTIFICATION FOR PPA LICENSES

Once a Private Applicator is issued a card the license will be in force until the next recertification period.

In Oklahoma, there is no "grandfather clause." All pesticide certifications are on a five (5) year cycle. This is determined from the last recertification period and not from the date an individual became certified.

WHY THE TESTS?

The Environmental Protection Agency has mandated that the States (EPA) will recertify private applicators. All Private Pesticide Applicators will be on the same five year cycle: 1983-1988 and 1989-1993, etc.

Under EPA guidelines the Oklahoma State Department of Agriculture is the licensing agency and must prove a person is competent to use or oversee the use of restricted use pesticides. This is why a person must take and pass a written exam before being issued a license.

In cooperation with Oklahoma State University a home study packet was developed.

FOR YOUR INFORMATION

- Private Applicators are subject to the same penalties as commercial applicators if state laws are violated. The Plant Industry Division is responsible for administering the Oklahoma Pesticide Applicator Law and the Oklahoma Pesticide Law.

- Carefully read all labels before using any pesticide.

- Protection of Endangered Species is a new program which will be limiting or prohibiting the use of pesticides in some areas. Be aware of these changes.

- EPA is also implementing sweeping changes in the standards for Ground Water Protection including training, application and restrictions. Practice good stewardship and safety habits at all times.

NEED MORE INFORMATION?

Pest Management Section
Oklahoma State Department of Agriculture
Plant Industry Division
2800 North Lincoln Boulevard
Oklahoma City, OK 73105-4298
(405)521-3864

Pesticide Coordinator
Oklahoma State University
501 Life Sciences West
Stillwater, OK 74078-0285
(405)744-5531

If you wish to receive copies of Oklahoma State University's "Pesticide Report" for updates on all information related to pesticide use and certification, write the Pesticide Coordinator at Oklahoma State University to have your name placed on the mailing list.

Source: "Private Pesticide Applicators: Easy as 1, 2, 3," Oklahoma Department of Agriculture, Plant Industry Division, Oklahoma City, Oklahoma.

BASIC ACADEMIC SKILLS

The following table identifies the basic academic skills that are reinforced in this unit of instruction. These basic academic skills were identified using *The Basic/Essential Skills Taxonomy*, 2nd ed. and verified during the validation process.

	SKILL AREA/ CODE	VERB	**LINK** A	**LINK** B
OBJECTIVE 1	Science 466	Identifies	Definitions	
	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 2	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 3	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-Oral/written	
OBJECTIVE 4	Science 037	Applies/Uses	Classification schemes	
	Science 466	Identifies	Definitions	
OBJECTIVE 5	Science 240	Describes/ Explains	Energy/Resources	
OBJECTIVE 6	Science 466	Identifies	Definitions	
	Science 037	Applies/Uses	Classification schemes	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 7	Science 466	Identifies	Definitions	
	Science 037	Applies/Uses	Classification schemes	
OBJECTIVE 8	Language Arts 147	Comprehends	Information/ written	Sequence
OBJECTIVE 9	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 10	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
OBJECTIVE 11	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 12	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
OBJECTIVE 13	Language Arts 013	Applies/Uses	Definitions	
	Science 291	Describes/ Explains	Diseases	
	Science 037	Applies/Uses	Classification schemes	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 14	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 15	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 16	Language Arts 013	Applies/Uses	Definitions	
	Language Arts 214	Identifies	Information-written	
	Language Arts 035	Attends	Directions/ task	
OBJECTIVE 17	Language Arts 227	Identifies	Information-written	Outcomes/ solutions
	Science 248	Describes/ explains	Force	
	Mathematics 229	Solves problems	Generate conclusions	Deductive reasoning
OBJECTIVE 18	Mathematics 229	Solves problems	Generate conclusions	Deductive reasoning
	Science 043	Applies/Uses	Models/ theories/laws	
	Science 037	Applies/Uses	Classification schemes	

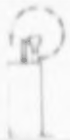
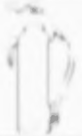
	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 19	Mathematics 229	Solves problems	Generate conclusions	Deductive reasoning
	Science 043	Applies/Uses	Models/ theories/laws	
	Science 037	Applies/Uses	Classification schemes	
OBJECTIVE 20	Language Arts 035	Attends	Directions/ task	
	Language Arts 147	Comprehends	Information-written	Sequence

LADDERS

1. INSPECT all ladders before use for worn safety shoes, broken or loose rungs, and other defects.
2. BE SURE metal ladders are clear of electrical hazards.
3. CHECK ladder steps and hand rails for oil or other slippery materials **before you climb**.
4. DO NOT USE ladders on uneven surfaces.
5. SECURE the base of a ladder by extending the base from the building or other support **at least one foot** for every **four feet** of height.
6. TIE-OFF the **top** and the **base** of the ladder with rope, wire, cement blocks, or sand bags.
7. PLACE the ladder **away** from doors or other openings that are not blocked or guarded.
8. SECURE the sections of two-section ladders with a rung lock.
9. DO NOT OVER-EXTEND your reach while on a ladder—move the ladder instead (but not while your are on it).
10. FACE the ladder when climbing up and down.
11. ALLOW only **one person** on the ladder at a time.
12. USE ladders only for their intended purpose and STORE ladders securely when not in use.

WARNING: Do not use ladder as a makeshift scaffold!

Types Of Fire Extinguishers

KIND OF FIRE	APPROVED TYPE OF EXTINGUISHER					
	MATCH UP PROPER EXTINGUISHER WITH CLASS OF FIRE SHOWN AT LEFT Important: Using the wrong type extinguisher for the fire may be dangerous					
DECIDE THE CLASS OF FIRE YOU ARE FIGHTING. . . THEN CHECK THE COLUMNS TO THE RIGHT OF THAT CLASS	**CARBON DIOXIDE** Carbon Dioxide Gas Under Pressure	**PUMP TANK** Plain Water	**MULTI-PURPOSE DRY CHEMICAL**	**ORDINARY DRY CHEMICAL**	**HALON**	**DRY POWDER**
CLASS A FIRES A Use These Extinguishers ORDINARY COMBUSTIBLES ●Wood ●Paper ●Cloth, etc						
CLASS B FIRES B Use These Extinguishers FLAMMABLE LIQUIDS, GREASE ●Gasoline ●Paints ●Oils, etc						
CLASS C FIRES C Use These Extinguishers ELECTRICAL EQUIPMENT ●Motors ●Switches, etc						
CLASS D FIRES D Use This Extinguisher COMBUSTIBLE METALS ●Iron ●Magnesium						

Adapted with permission of American Association for Vocational Instructional Materials, Athens, Georgia, from *Developing Shop Safety Skills* by Clinton O. Jacobs and J. Howard Turner, 1981.

TORNADO TIPS

Tornado—Violent rotating column of air in contact with the ground. It has many faces: cone shaped, rotating mass of debris at the surface with no visible connection to the cloud; dark seething cloud on the ground.

Look and **listen** for

- Series of pouches projecting downward from the storm's base.
- Large hail, heavy rain, strong winds.
- Intense, frequent lightning.
- Loud roar like the sound of a jet or train.
- Rotating cloud of debris or dust near the ground.
- Bulge or pendent with organized rotary motion at the base of a thunderstorm.

"Typical" Tornado

- Time: 7:39 p.m. DST
- Path: 5 1/2 miles
- Width: 500 feet
- Area: 1 square mile

Safety Tips

- Seek inside shelter—leave vehicles.
- Avoid windows, doors and outside walls.
- Protect head and chest . . . crouch, face to floor, hands clasped behind head.
- Home—go to shelter or basement . . . first floor, interior small room, bathroom, closet or hall . . . under sturdy furniture, mattress or in a tub.

- Schools, Offices—go to designated shelter . . . interior rooms or hallways on lowest floor; avoid auditoriums and gymnasiums.
- Mobile Homes or Vehicles—evacuate to substantial structure, ditch, culvert or ravine.
- Be sure everyone is familiar with your safety plan; have a portable TV/radio and flashlight in your shelter area.

Tornado watch

- Conditions favor tornado development.
- Make preliminary plans.
- Watch for threatening conditions.

Tornado warning

- Tornado has been reported!
- Take cover immediately if in or near the warning area.

INFORMATION SHEET

PROVIDING FOR HEALTH AND SAFETY IN THE WORKPLACE

II

OBJECTIVE 1

Match terms associated with general safety practices to their correct definitions.

- **Accident**—Any suddenly occurring, unintentional event that causes injury or property damage
- **Carelessness**—Failure to think before one acts; failure to pay attention
- **Combustible**—Capable of bursting into flames; such liquids reach their flashpoint at temperatures of 100° F or higher
- **Extinguish**—To put out a fire; to cause to cease burning
- **Flammable**—Capable of being easily ignited and burning quickly; such liquids reach their flashpoint at temperatures below 100° F

  NOTE: Inflammable and flammable both mean "capable of being easily ignited and burning quickly." Since some people might misinterpret inflammable to mean "non flammable," it is generally better to use the term "flammable."

- **Flashpoint**—Temperature at which a flammable or combustible liquid generates enough gases to form an ignitable mixture in air
- **Safety**—Freedom from danger, risk, or injury

OBJECTIVE 2

State reasons why safety practices and procedures are needed.

- To prevent physical harm to yourself and others
- To avoid loss of work
- To avoid possible loss of pay
- To lower cost to employer
- To prevent loss of or damage to equipment and/or materials
- To lower insurance rates
- To prevent hardship on family

- To provide regular job schedules
- To prevent possible loss of job

OBJECTIVE 3 **State general job safety rules.** (Transparency Masters 1 and 2)

General

- Know correct emergency telephone numbers in your area; be sure they are posted near the telephone.

  EXAMPLES: Fire and police departments, ambulance service, poison control center, Local Emergency Planning Committee (LEPC), Discharge Report and Response Center (DRRC)

- Be alert and conduct yourself in a safe manner.
- Be aware of where others are in the shop or store and of what they are doing.
- Observe color codes, warning signs and labels and instructional signs and tags.
- Be familiar with the location of fire fighting and first-aid equipment.
- Report *all* accidents to your supervisor, no matter how minor they may seem.

Dress

- Wear close-fitting clothing appropriate for the work being done.
- Confine long hair before using power equipment or working around moving parts.

  EXAMPLES: Running engines, moving belts, air wrenches, drive shafts

- Wear safety equipment when required.

  EXAMPLES: Appropriate goggles, apron, gloves, ear protection, hard hat, and steel-toed shoes

- Remove rings and other jewelry before going into shop.

- Do **not** carry tools or sharp objects in your pockets.

Equipment and tools

WARNING: Avoid horseplay; especially with power equipment, it may cause serious injury.

- **Obey all safety rules and operating instructions provided by the equipment manufacturer, plus any additional ones used in the shop.**
- Keep tools clean and in good working order.
- Properly store tools and equipment when not in use.
- Keep guards and safety devices in place on all equipment.
- Tag and report to the supervisor any defective tools, machines, or equipment.
- Turn off power equipment when not in use.
- Operate equipment only after receiving training on how to use it properly and safely.
- Disconnect power equipment from power source before changing accessories or performing maintenance on it.
- Use the correct tool for the job.
- **Never use compressed air to clean yourself or your clothing; do not direct compressed air toward your body or another person.**

WARNING: Chips and debris may blow into eyes, compressed air can get into the blood system resulting in death.

Work area

- Arrange equipment and vehicles to allow safe working practices and ease of cleaning.
- Store materials and supplies safely in their proper places.
- Store tools and accessories safely in suitable storage containers or areas.
- Keep regular entrance doors in good condition - adjust door checks to close slowly.

- Keep work area organized and clear of debris and other hazards.

- Keep display counters, stands, and gondolas free of nails, splinters, broken glass, etc.

- Clear floors of obstacles and slippery substances; clean up spills immediately.

- Check for open carpet seams; tears or folds in carpet, holes in flooring, etc.

- Keep aisles, exits, and traffic areas free of materials and debris. Keep sidewalk and driveway surfaces in good repair.

- Dispose of combustible materials properly.

  EXAMPLES: Gasoline and solvents

- Keep enough brooms, brushes, waste containers, and housekeeping supplies on hand to keep the work area clean.

Flammable materials and toxic substances

WARNING: Misuse of flammable materials and toxic substances can cause serious injury or even death.

- Carefully read and follow label directions for flammable liquids and toxic substances; use only in well-ventilated areas.

- Avoid breathing fumes from flammable liquids and toxic substances.

- Be sure that flammable liquids and toxic substances are properly marked and stored.

  NOTE: Keep flammable liquids and toxic substances in their original containers or in properly marked, approved containers.

- Have at work area only the amount of flammable liquid or toxic substances needed for the job being done.

- Immediately change clothing on which flammable or toxic materials have been spilled.

- Use flammable liquids and toxic substances only for their intended purposes.

  EXAMPLE: Never use gasoline as a cleaner or solvent.

- If your hair or clothing catches fire, do not run; **stop, drop,** and **roll** to smother the fire, using a blanket, fender cover or whatever is available.

- Do **not** use flammable materials near a fire or flame.

OBJECTIVE 4

Distinguish between colors of the safety color code and their correct applications.

NOTE: The federal safety color code system was devised so that dangers and safety equipment could be easily identified by anyone familiar with the code even if they see the colors in a place where they have never been before. Standards are given in American National Standard Z53.1, Safety Color Code for Marking Physical Hazards and the Identification of Certain Equipment.

Federal safety red

- Indicates danger.

- Identifies fire protection equipment and its location.

- Identifies portable containers of flammable liquids.

- Identifies emergency stop bars, stop buttons, and electrical stop switches on machinery.

Federal safety yellow

- Indicates caution and marks physical hazards that may result in accidents from slipping, striking against, falling, etc.

  EXAMPLES: Low beams, steps, pits

- Indicates waste containers for explosive or combustible materials.

- Indicates materials handling equipment, such as lift trucks.

- Indicates equipment that should **not** be started, used, or moved.

  EXAMPLES: Defective equipment, equipment being serviced

- Identifies the starting point or power source for machinery.

Federal safety orange

- Identifies dangerous parts of equipment that could cut, crush, shock, or otherwise injure.

  EXAMPLES: Exposed cutting edges and inside of movable guards

- Indicates safety starter buttons.

- Indicates slow-moving vehicles (25 mph or slower).

  NOTE: This type is usually a triangle shape with red border. It is often used to warn of slow-moving vehicles such as farm tractors, mowers, graders, forklifts, road patrol, etc.

Federal safety purple (or magenta or black on safety yellow)

- Indicates radiation hazards.

Federal safety blue

- Used on information signs and bulletin boards (not of a safety nature).

- Warning tags that indicate equipment that should **not** be moved while unloading.

  EXAMPLES: Boxcars, freight cars, other railroad equipment, etc. May be used as a sign for promotional slogans or informational posters.

Federal safety green

- Identifies safety equipment *other than fire fighting equipment* and its location.

- Identifies first aid equipment and its location.

Federal safety black and white and combinations of them in stripes and checks

- Indicates traffic flow paths.

- Indicates storage areas.

- Identifies housekeeping equipment and its location.

- Also used as contrasting sign.

OBJECTIVE 5 **Name the components of the fire triangle.**

NOTE: To produce fire, the following three elements are necessary and must be present at the same time. If any one of the three is missing, a fire cannot be started. With the removal of any one of the three, the fire will be extinguished.

- Fuel

  NOTE: Fuel may be any flammable material. This includes gases, liquids or solids.

  EXAMPLES: 1) Gases: Natural gas, propane, butane, hydrogen, acetylene, carbon monoxide. 2) Liquids: Gasoline, kerosene, paint thinner, alcohol, cod liver oil, paint, varnish, lacquer, olive oil. 3) Solids: Coal, wood, paper, cloth, wax, grease, leather, plastic, sugar, grain, hay, cork

- Heat

  NOTE: Enough heat must be present to raise the fuel to its ignition temperature.

  EXAMPLES: Sun, hot surfaces, sparks, friction, electrical energy, compression of gases.

- Oxygen

  NOTE: Oxygen is necessary to sustain combustion. Approximately 16% is required. Normal air contains 21%. Some fuel materials contain sufficient oxygen within their makeup to support burning.

OBJECTIVE 6 **Match classes of fires to their correct descriptions.**

- **Class A**—Fires that occur in ordinary combustible materials such as paper, wood, rags, rubber, and plastics

- **Class B**—Fires that occur with flammable liquids such as gasoline, oil, grease, paint, and solvent

- **Class C**—Fires that occur in or near electrical equipment such as motors, switchboards, computers, and electrical wiring

  CAUTION: Never use pressurized water on a Class C fire.

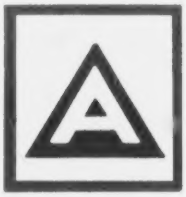
- **Class D**—Fires that occur with combustible metals such as iron, magnesium, sodium, and potassium

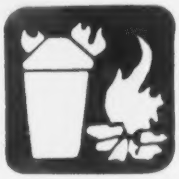
OBJECTIVE 7

Match pictorial labels of fire extinguishers to the class of fire for which each is used. (Transparency Masters 3, 4, and 5)

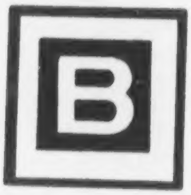
Fire extinguishers contain different kinds of materials that may or may not be suitable for use in putting out a certain class of fire. Extinguishers, by law, must be clearly marked as to what kinds of fires they can be used on. Older labels have a letter indicating class of fire and newer labels with a pictorial representation of each class of fire (or at least A, B, and C with a band across the picture of fire classes for which the extinguisher is not suitable).

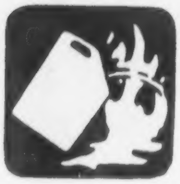
Class A labels



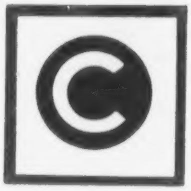


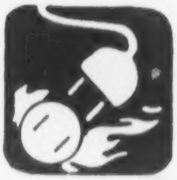
Class B labels



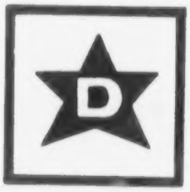


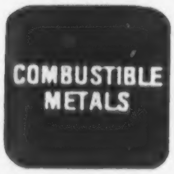
Class C labels





Class D labels




COMBUSTIBLE
METALS

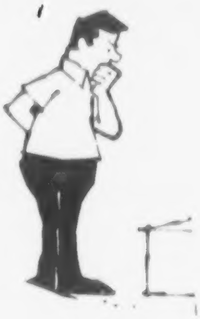
OBJECTIVE 8

Arrange in order procedures used to correctly lift a heavy object.

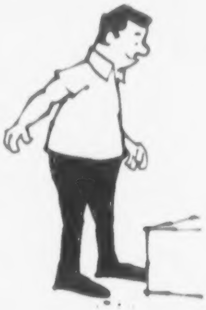
NOTE: Lifting is something we usually don't give much thought to. But if done incorrectly, it can cause pulled muscles, back problems, or a hernia.

CAUTION: Always consider the size, weight, and shape of the object to be carried. Do not lift more than can be carried comfortably. Be sure your path is clear. Never carry a load that you cannot see over or around. If needed, get assistance.

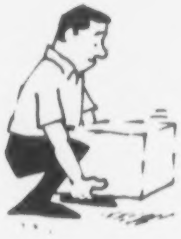
1. Approach the load and size it up (weight, size and shape). Consider your physical ability to handle the load.



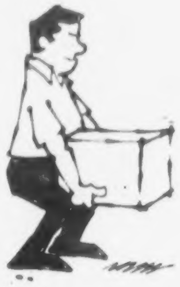
2. Place the feet close to the object to be lifted, 8 to 12 inches apart for good balance.



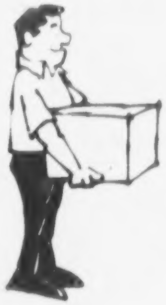
3. Bend the knees to the degree that is comfortable and get a good hand-hold.



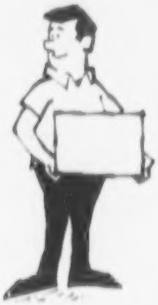
4. Using both leg and back muscles lift the load straight up—smoothly and evenly. Pushing with your legs, keep the load close to your body.



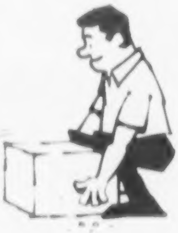
5. Lift the object into carrying position, making no turning or twisting movements until the lift is completed.



6. Turn your body with changes of foot position after looking over your path of travel making sure it is clear.



7. Setting the load down is just as important as picking it up. Using leg and back muscles, comfortably lower load by bending your knees. When load is securely positioned, release.



Steps are from the National Institute for Occupational Safety and Health, Cincinnati, Ohio. I

OBJECTIVE 9

List items to consider when planning emergency evacuation procedures.

NOTE: Each business needs an emergency evacuation plan for situations such as earthquakes, tornadoes, bomb threats, acts of terror, and riots. Lack of planning could result in unnecessary deaths.

- Have a predetermined plan for evacuation.

  NOTE: It is wise to have more than one path in the event one direction is blocked.

- Practice plan periodically and modify as necessary.
- Designate an area away from facility for employees to meet.
- Assign team leaders to direct evacuation and to account for all employees and customers.
- Make sure all exits are clearly marked and free of clutter which could hamper the evacuation process.
- Stress the importance of remaining calm.

OBJECTIVE 10

List the purposes of the Occupational Safety and Health Administration.

Until 1970 no uniform and comprehensive provisions existed for monitoring safety and health hazards in the workplace. To help protect workers Congress passed the Occupational Safety and Health Act of 1970. Under the Act, the Occupational Safety and Health Administration (OSHA) was created within the Department of Labor.

The purpose of OSHA is to:

- Encourage employers and employees to reduce workplace hazards and to implement new or improve existing safety and health programs;
- Provide for research in occupational safety and health to develop innovative ways of dealing with occupational safety and health problems.
- Establish "separate but dependent responsibilities and rights" for employers and employees for the achievement of better safety and health conditions.

- Maintain a reporting and recordkeeping system to monitor job-related injuries and illnesses.

- Establish training programs to increase the number and competence of occupational safety and health personnel.

- Develop mandatory job safety and health standards and enforce them effectively.

- Provide for the development, analysis, evaluation, and approval of state occupational safety and health programs.

  NOTE: In general, coverage of the Act extends to all employers and their employees in the 50 states, the District of Columbia, Puerto Rico, and all other territories under Federal Government jurisdiction. Coverage is provided either directly by Federal OSHA or through an OSHA-approved state program. The following are not covered under the Act:

  - Self-employed persons

  - Farms at which only immediate members of the farm employer's family are employed

  - Workplaces already protected by other federal agencies under other federal statues

Credit: U.S. Department of Labor, Occupational Safety and Health Administration, *All About OSHA*, 1985.

OBJECTIVE 11 **Select from a list features of worker's compensation insurance.**

- Cost is paid by employer.

- Employer may purchase insurance from a private company or a state owned fund.

- Only injuries which occur on the job are covered.

- Treatment for an injury or occupational disease is covered.

- Compensation benefits are provided for temporary and permanent disabilities.

- In case of death, compensation benefits are provided for surviving dependents.

NOTE: For more information contact your employment personnel office.

OBJECTIVE 12

Discuss how hazardous materials enter the body and precautions which should be taken.

WARNING: There are both immediate and accumulative effects of inhaling, absorbing, or ingesting hazardous materials. Inhaling, absorbing, or ingesting hazardous materials can cause serious injury or even death.

Inhalation—Breathing hazardous materials.

EXAMPLES: Mists, dust, vapors, particles, gases, exhaust fumes; these may be from bug sprays, concrete dust, paint, gasoline, pesticides, yard sprays, herbicides, cleaning fluids, paint thinner, or formaldehyde

Precautions against inhalation of hazardous materials

- Use adequate and proper ventilation.
- Wear personal protective equipment.

Absorption—Being exposed to a hazardous material through the skin.

EXAMPLES: Solvents; cleaning fluids and sealants; grease, oil, and other lubricants, glues; acids, carcinogens; pesticides, herbicides, and weed and bug killer

Precautions against absorption of hazardous materials

- Wear personal protective equipment.
- Keep hazardous substances in designated areas only.
- Clean up spills and leaks immediately.
- Avoid direct contact with a hazardous material—wash thoroughly after contact.

Ingestion—Swallowing something that has become contaminated; touching the mouth with a hand after contact with a hazardous substance.

EXAMPLES: Mouth contact with food and drink, envelopes, cups and glasses, cigarettes, hands and fingers, eating utensils

Precautions against ingestion of hazardous materials

- Keep hazardous substances in designated areas only.
- Wear personal protective equipment.
- Wash thoroughly after contact and before touching **anything.**
- Allow no food items in work areas with hazardous substances.

OBJECTIVE 13 **List symptoms of pesticide poisoning.**

These symptoms occur with herbicides and with some pesticides. Symptoms of pesticide poisoning are so varied that it is difficult to give a general overall description.

WARNING: Pesticide poisoning can cause serious injury or even death. In the event of poisoning, get immediate medical attention or call a poison control center. Have the label with you when you report to a poison control center or a doctor.

- **Mild poisoning**—Irritation of the skin, nose, throat, and eyes; weakness, dizziness, headache, nausea, diarrhea
- **Moderate poisoning**—Difficult breathing, blurred vision, rapid pulse, flushed skin, stomach cramps, vomiting, muscle twitches, poor muscle coordination, constricted pupils
- **Severe poisoning**—Convulsions, loss of consciousness, secretions from nose and mouth, inability to breathe, often accompanied by fever; MAY BE FATAL

OBJECTIVE 14 **List steps to prevent misuse of pesticides.** (Supplement 1)

Pesticides by their very nature are poisonous to people, other animals, and sometimes plants. A poisonous or toxic compound becomes dangerous when it is improperly or carelessly used. Poisonous compounds may be used safely when used at concentrations, rates, and with methods of application for which they are recommended.

When the following steps are observed, misuse will seldom occur:

- Properly identify the pest problem and determine what pesticide to use. Seek an expert's advice if in doubt.
- Apply the recommended material according to the labeled instructions.
- Store pesticides in their original labeled containers in a locked storage area out of the reach of children, pets, and livestock.
- Dispose of empty containers promptly, safely, and according to the law.

Credit: 1990 OSU Extension Agents' Handbook of Insect, Plant Disease and Weed Control, Oklahoma State University Cooperative Extension Service, Stillwater Oklahoma, 1990.

OBJECTIVE 15 **List guidelines for pesticide safety.**

When handling pesticides, precautions must be taken. The following list contains some general precautions to follow. This list is not complete. Check the manufacturer's label. Also, check with your local county extension agent for additional precautions.

Pesticides are dangerous and improper use can cause serious injury or death. Always follow label directions.

- Read the manufacturer's label carefully and completely.
- Wear clean protective clothing and equipment as required.
- Do not eat, drink, or smoke while handling pesticides.
- Avoid ingesting or inhaling pesticides; avoid skin contact with pesticides.
- If concentrates or dilute pesticides are spilled on the skin or clothing, remove the clothing at once and wash the skin thoroughly with soap and water.
- Always mix pesticides in an open area where ventilation is adequate; never mix pesticides in an enclosed area.
- Never use the hands and arms to stir pesticides or to reach into a container of pesticides to retrieve tools or other items dropped into them.

- Never use sprayers with leaking hoses or connections. Keep application equipment in proper working condition.

- Never allow drift onto neighboring fields. Remove pets and livestock from areas to be treated.

- Never spray directly into the wind or overhead.

- When application equipment is not being used, keep it in an area where children and livestock cannot get to it. Wash spray equipment after each use to avoid hazardous accumulation.

- Never contaminate fish ponds, streams, or lakes.

- Store pesticides in the original labeled containers away from food, feed, seed, fertilizers, or medicine, and out of reach of children, pets, and livestock. Use a storage area that can be locked.

- Never guess what is in the pesticide container. If the label has been damaged or removed, discard the entire container with its contents.

- Dispose of empty containers promptly and safely. Follow the directions on the label.

- Call a doctor or get the patient to a hospital immediately if the symptoms of poisoning occur during or shortly after spraying or dusting. Carry the pesticide label or labeled container with you.

Credit: 1990 OSU Extension Agents' Handbook of Insect, Plant Disease and Weed Control, Oklahoma State University Cooperative Extension Service, Stillwater Oklahoma, 1990.

OBJECTIVE 16 **Name information found on a pesticide label.**

D•z•n®

1. Trade or brand name

Active Ingredients:
O, O-diethyl O-(2-isopropyl-6-methyl-4-pyrimidinyl) phosphorothioate 48%

2. Chemical name

Five Gallons

U.S. Standard Measure

3. Net contents

Warning

See additional warning statements left of container seam.

4. Signal words and symbols

EPA Est. 100-AL-1
EPA Reg. No. 100-461
Control No. 52200

See directions for use on panel at right.

5. Registration and establishment numbers

Insecticide

For control of certain insects on fruits, nuts, vegetables, field crops, and ornamentals

Sample label used with permission of CIBA-GEIGY Corporation.

Diazinon **AG500**

6. Common name

Active Ingredients:

O, O-diethyl O-(2-isopropyl-phosphorothioate	**48%**
Xylene	**36%**
Inert Ingredients:	**16%**
Total:	**100%**

7. Ingredient statement

Directions for Use

It is a violation of federal law to use this product in a manner inconsistent with its labeling.

8. Use classification

Fruit and Nut Crops

Note: Unless otherwise stated, the following rates should be applied as a dilute full cover spray.

Almonds
Mites, Twig Borers: Apply 1-1½ pts. per 100 gals. of water.

Parlatoria Scales, San Jose Scales: Mix 1-1½ pts. D•z•n Diazinon AG500 plus 2-3 gals. dormant oil per 100 gals. of water and apply as a dormant spray.

Almond hulls may be used for feed for livestock.

9. Directions for use

Note: The California Department of Agriculture has set a 5-day reentry for Diazinon on citrus, grapes, peaches, and nectarines. Five days should elapse between the time of application and the time a worker may enter the field to engage in any activity requiring substantial contact with treated foliage. When a mixture of two or more organic phosphate pesticides is applied, the interval shall be prolonged by adding to the longest applicable interval an additional 50% of that interval.

10. Re-entry statement

Statement of Practical Treatment

If swallowed, call a physician immediately. DO NOT INDUCE VOMITING UNLESS NO OTHER TREATMENT IS AVAILABLE. Vomiting may cause aspiration pheumonia. If it is necessary to induce vomiting, give victim one or two glasses of water and insert finger in back of throat. Repeat until vomit fluid is clear. Do not induce vomiting or give anything by mouth to an unconscious person.

If inhaled, remove victim to fresh air and apply artificial respiration if indicated.

If on skin, wash promptly with soap and water. Rinse thoroughly.

If in eyes, rinse eyes for at least 15 minutes with water and call a physician immediately.

Note to Physician: Gastric lavage is indicated. Atropine sulfate and 2-PAM are specific antidotes.

Environmental Hazards

This product is toxic to fish, birds, and other wildlife. Birds feeding on treated areas may be killed. Keep out of lakes, streams, ponds, tidal marshes, and estuaries (except for affluence from treated watercress beds). Do not apply to water that will be used for recreational purposes and human and livestock consumption. Shrimp and crab may be killed at application rates recommended on this label. Do not apply where fish, shrimp, crab, and other aquatic life are important resources. This product must not be used in areas where impact on threatened endangered species is likely. Contact your State Fish and Game Agency for information pertaining to areas having threatened endangered species. Apply this product only as specified on this label.

This pesticide is highly toxic to bees exposed to direct treatment or to residues remaining on the treated area. Do not apply when bees are actively visiting the crop, cover crop, or weeds blooming in the treatment area. Applications should be limited to provide the maximum possible interval between treatment and the next period of bee activity.

11. Statement of practical treatment

Physical or Chemical Hazards

Do not use, pour, spill, or store near heat or open flame.

12. Physical or chemical hazards

Storage and Disposal

Do not contaminate water, food, or feed by storage or disposal. Open dumping is prohibited. Pesticide, spray mixture, or rinsate that cannot be used or chemically reprocessed should be disposed of in a landfill approved for pesticides or buried in a safe place away from water supplies. Reseal container and offer for reconditioning, or triple rinse (or equivalent) and offer for recycling, reconditioning, or disposal in approved landfill, or bury in a safe place. Consult federal, state, or local disposal authorities for approved alternative procedures.

13. Storage and disposal directions

Precautionary Statements

Hazards to Humans and Domestic Animals

WARNING

May be fatal if swallowed. May be absorbed through skin. Do not breathe spray mist. Do not get in eyes, on skin, or on clothing. Wash thoroughly after handling. Avoid contamination of food. Do not use on humans or permit children to go onto sprayed grass until spray has completely dried.

Keep out of reach of domestic animals. Do not contaminate feed or use on household pets or livestock. Do not permit pets to go onto sprayed grass until spray has completely dried.

14. Precautionary-statement

Agricultural Division
CIBA-GEIGY Corporation
Greensboro, NC 27409
CGA 1L83C 060

15. Name and address of manufacturer

POISON CONTROL CENTERS

Oklahoma State
Coordinator
(405)271-5454
or
800-522-4611
Oklahoma Poison Control
Center
Oklahoma Children's
Memorial Hospital
P.O. Box 26307
Oklahoma City, OK 73126

ADA
(405)322-2323
Ext. 200
Valley View Hospital
1300 E. 6th St.
Ada, OK 74820

ARDMORE
(405)233-5400
Memorial Hospital of
Southern Oklahoma
11011-14th Ave. 73401

OKLAHOMA CITY
(405)271-5454
Oklahoma Poison Control
Center
(800) 522-4611
(Oklahoma)

Oklahoma Children's
Memorial Hospital
P.O. Box 26307
73126

PONCA CITY
(405)765-3321
St. Joseph Medical Ctr.
14th & Hartford 74601

LAWTON
(405)355-8620
Comanche County
Memorial Hospital
3401 Gore Blvd. 73501

McALESTER
(918)584/1351
McAlester General
Hosp., Inc. West
P.O. Box 669 74501

TULSA
(918)584/1351
Hillcrest Medical Ctr.
1653 East 12th

NEARBY OUT OF STATE POISON CONTROL CENTERS

ARKANSAS
St. Edward's Mercy Hospital
1411 Rogers Avenue
Ft. Smith, Arkansas 72901
(501)782-3071
Ext. 210

Sparks Regional Medical Center
1311 Eye Street
Ft. Smith, Arkansas 72901

MISSOURI
Poison Control Center
St. John's Hospital
2727 McCelland Boulevard
Joplin, Missouri 64801
(417)781-2727 Ext. 276

KANSAS
Labette County Medical Center
South 21st Street
Parson, Kansas 67357
(316)-421-4880

Wesley Medical Center
550 N. Hillside Avenue
Wichita, Kansas 67214
(316)685-2151
Ext. 7515

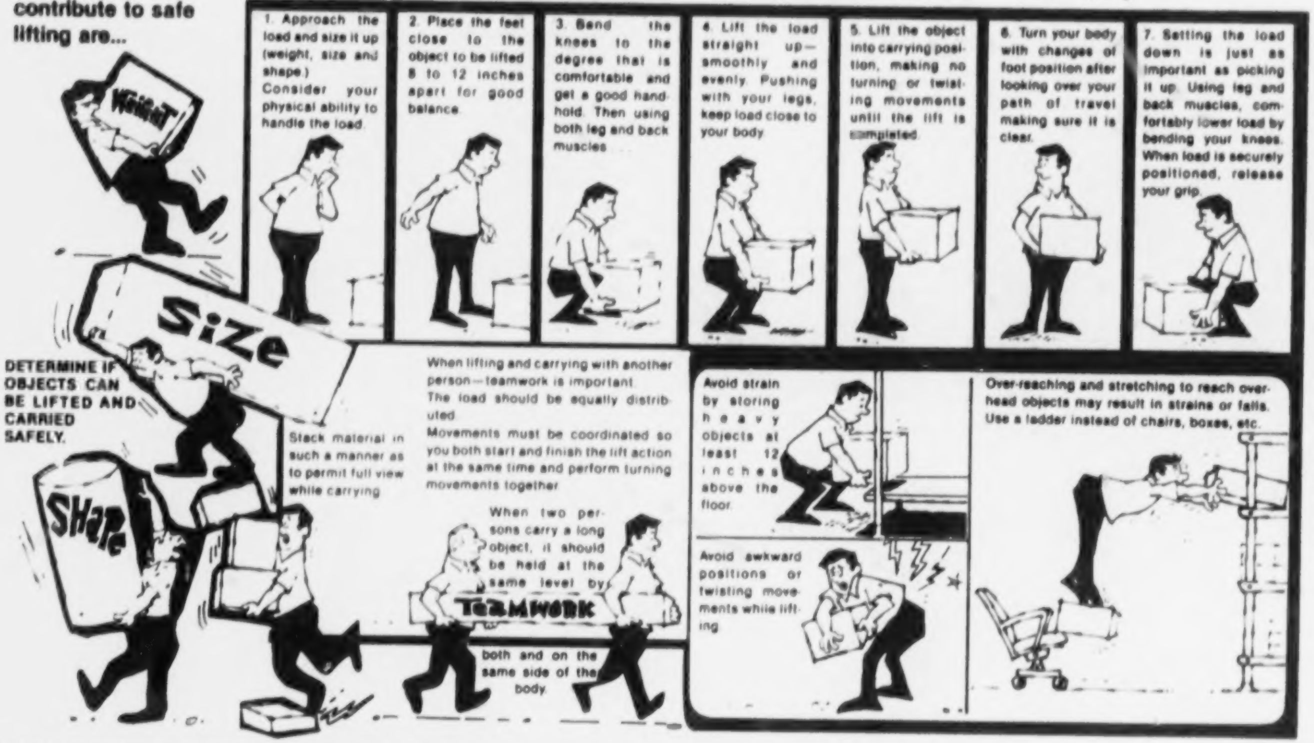
TEXAS
Amarillo Poison Control Center
Amarillo Hospital District
Amarillo Emergency Receiving
Center
P.O. Box 1110
2203 West 6th Street
Amarillo, Texas 79175
(806)376-4431 Ext. 501,
502, 503, 504

Wichita Falls Poison Control Center
Wichita General Hospital
Emergency Room
1600 Eighty Street
Wichita Falls, Texas 76301
(817)322-6771

Courtesy of Oklahoma State University Cooperative Extension Service

The factors that contribute to safe lifting are...

The following safe practices should be observed in order to avoid injury.



1. Approach the load and size it up (weight, size and shape.) Consider your physical ability to handle the load.

2. Place the feet close to the object to be lifted 8 to 12 inches apart for good balance.

3. Bend the knees to the degree that is comfortable and get a good hand-hold. Then using both leg and back muscles . . .

4. Lift the load straight up—smoothly and evenly. Pushing with your legs, keep load close to your body.

5. Lift the object into carrying position, making no turning or twisting movements until the lift is completed.

6. Turn your body with changes of foot position after looking over your path of travel making sure it is clear.

7. Setting the load down is just as important as picking it up. Using leg and back muscles, comfortably lower load by bending your knees. When load is securely positioned, release your grip.

DETERMINE IF OBJECTS CAN BE LIFTED AND CARRIED SAFELY.

Stack material in such a manner as to permit full view while carrying.

When lifting and carrying with another person—teamwork is important.
The load should be equally distributed.
Movements must be coordinated so you both start and finish the lift action at the same time and perform turning movements together.

When two persons carry a long object, it should be held at the same level by both and on the same side of the body.

Avoid strain by storing heavy objects at least 12 inches above the floor.

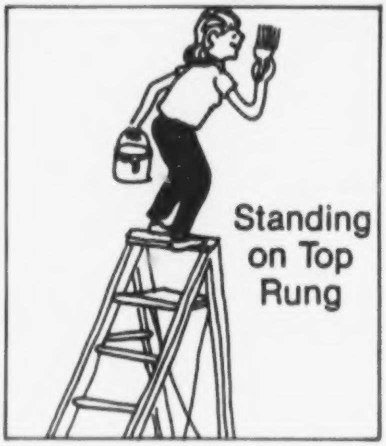
Avoid awkward positions or twisting movements while lifting.

Over-reaching and stretching to reach overhead objects may result in strains or falls. Use a ladder instead of chairs, boxes, etc.

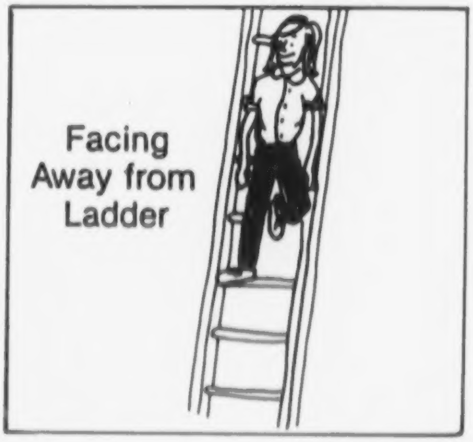
Used with permission of the National Institute for Occupational Safety and Health, Cincinnati, Ohio.

Ladder Safety

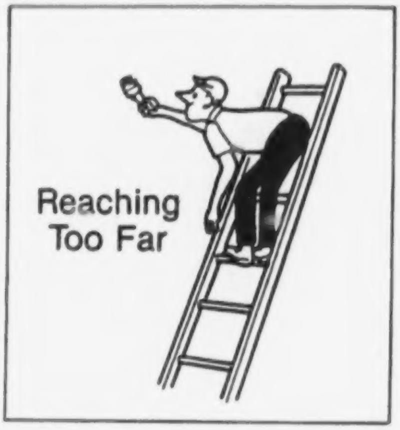
Some Causes of Accidents



Standing on Top Rung



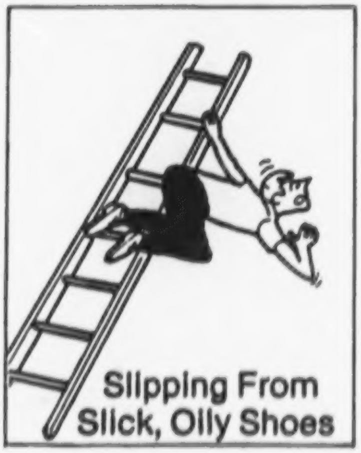
Facing Away from Ladder



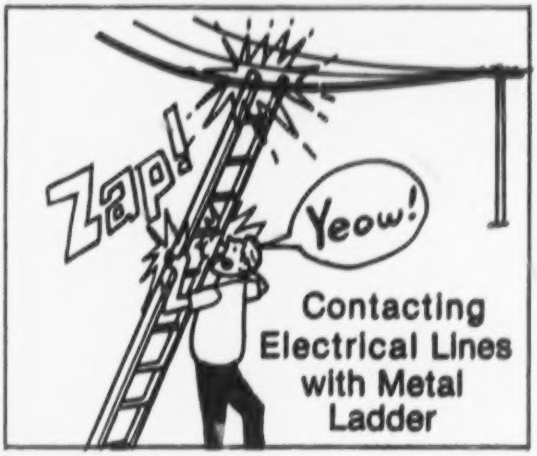
Reaching Too Far

Ladder Safety

Some Causes of Accidents

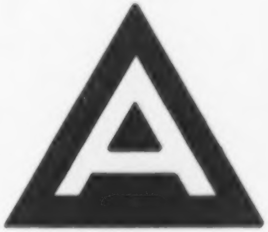
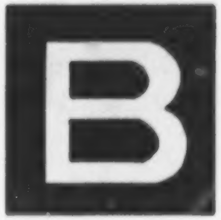
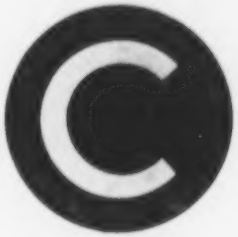
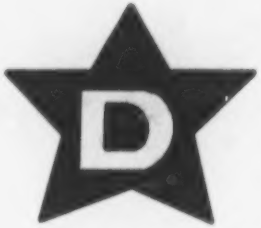


Slipping From Slick, Oily Shoes



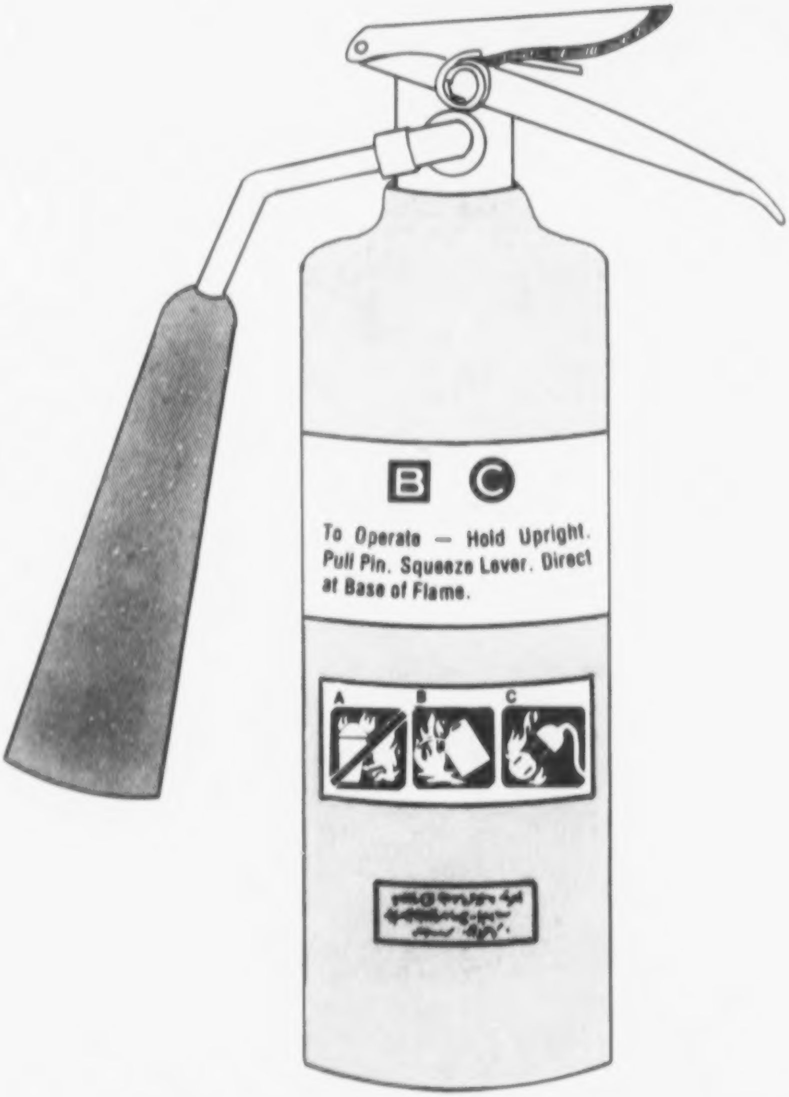
Contacting Electrical Lines with Metal Ladder

Standard Letter Symbols for Fire Extinguishers

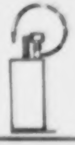
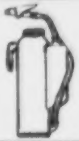
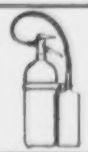
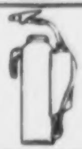
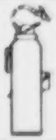
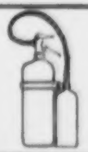
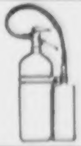
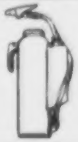
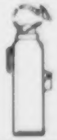
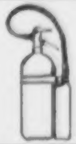
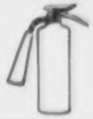
GREEN	RED	BLUE	YELLOW
			
ORDINARY COMBUSTIBLES	FLAMMABLE LIQUIDS	ELECTRICAL EQUIPMENT	COMBUSTIBLE METALS

Distinctive letters, shapes, and colors mark extinguishers according to the classes of fires on which they should be used.

Fire Extinguisher Suitable for Class B and Class C Fires


B C
To Operate — Hold Upright. Pull Pin. Squeeze Lever. Direct at Base of Flame.
A
B
C

Types of Fire Extinguishers

KIND OF FIRE	APPROVED TYPE OF EXTINGUISHER					
	MATCH UP PROPER EXTINGUISHER WITH CLASS OF FIRE SHOWN AT LEFT Important: Using the wrong type extinguisher for the fire may be dangerous					
DECIDE THE CLASS OF FIRE YOU ARE FIGHTING. . . THEN CHECK THE COLUMNS TO THE RIGHT OF THAT CLASS	**CARBON DIOXIDE** Carbon Dioxide Gas Under Pressure	**PUMP TANK** Plain Water	**MULTI-PURPOSE DRY CHEMICAL**	**ORDINARY DRY CHEMICAL**	**HALON**	**DRY POWDER**
A **CLASS A FIRES** Use These Extinguishers ORDINARY COMBUSTIBLES ●Wood ●Paper ●Cloth, etc.						
B **CLASS B FIRES** Use These Extinguishers FLAMMABLE LIQUIDS, GREASE ●Gasoline ●Paints ●Oils, etc.						
C **CLASS C FIRES** Use These Extinguishers ELECTRICAL EQUIPMENT ●Motors ●Switches, etc.						
D **CLASS D FIRES** Use This Extinguisher COMBUSTIBLE METALS ●Iron ●Magnesium						

Adapted with permission of American Association for Vocational Instructional Materials, Athens, Georgia, from *Developing Shop Safety Skills* by Clinton O. Jacobs and J. Howard Turner, 1981.

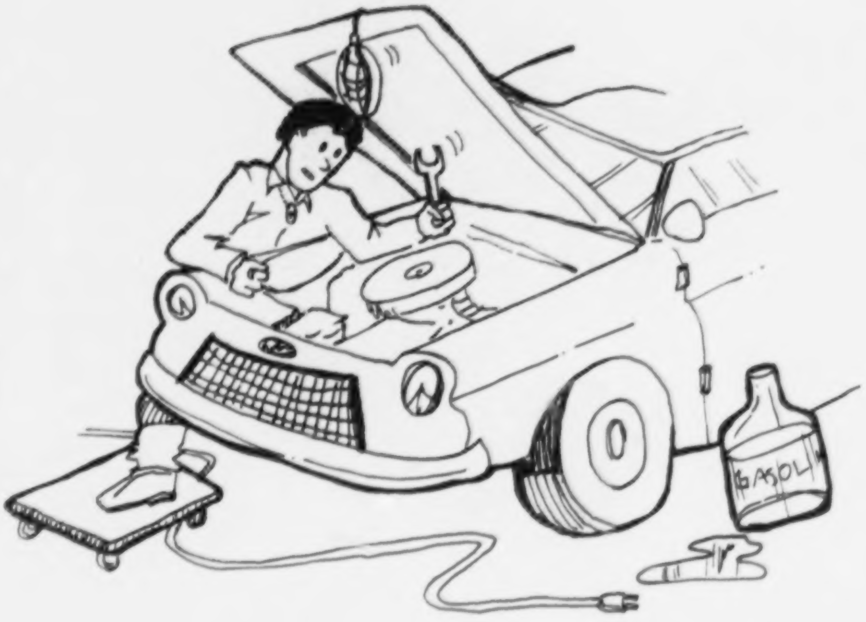
ASSIGNMENT SHEET 1	PROVIDING FOR HEALTH AND SAFETY IN THE WORKPLACE	II

NAME ______________________________ SCORE ________

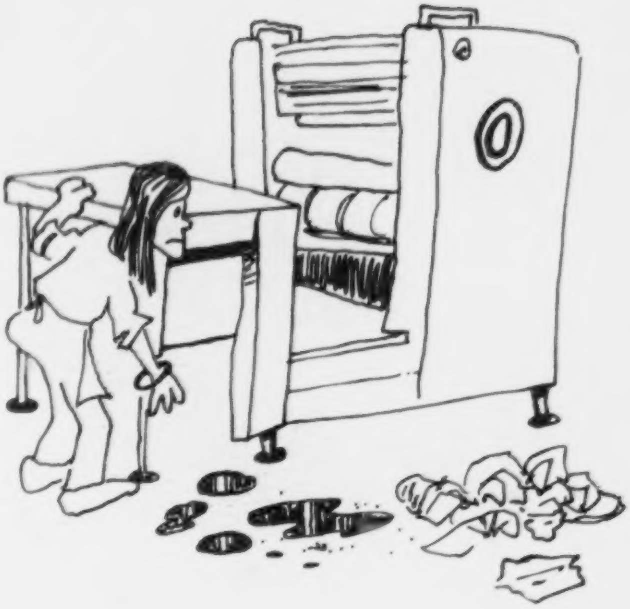
OBJECTIVE 17 **Analyze situations to determine correct safety practices.**

INTRODUCTION As an employee, you must constantly be aware of threats to your safety and to the safety of others. In many jobs, potentially dangerous tools and equipment may be used. Accidents may happen in work areas even with momentary carelessness. This assignment sheet will give you practice in recognizing and dealing with such situations. Appropriate actions in such situations may save money and lives.

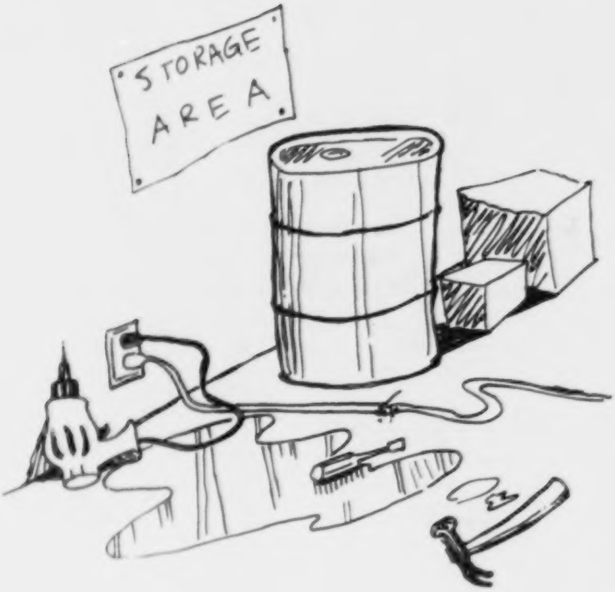
DIRECTIONS Study the pictures on the following pages. List any dangerous situations or practices in the blanks below each picture. Add any comments on how the situation might be improved.



1. ______________________________



2. ____________________


STORAGE AREA

3. ______________________________

ASSIGNMENT SHEET 2

PROVIDING FOR HEALTH AND SAFETY IN THE WORKPLACE

II

NAME ______________________________ SCORE ________

OBJECTIVE 18

Determine colors used in the safety color code from given situations.

INTRODUCTION

In order to observe safety procedures and avoid accidents, it is necessary to know the federal safety color code system. Often, this system could be your only warning against possible danger. This assignment sheet will help you become familiar with federal safety colors and their uses.

DIRECTIONS

Write the appropriate federal safety color(s) for each situation in the blanks.

If needed, refer to Information Sheet, Objective 4.

1. You are about to pull a truck into the tire repair shop. What color of lines indicate the traffic flow paths you should follow?

   ____

2. Your supervisor at the veterinary hospital asks you to replace the tag which someone removed from the X-ray machine. What color tag should you use?

   ____

3. You have mopped up a kerosene spill and want to properly dispose of the rags you used. What color of waste container should you look for?

   ____

4. Your supervisor in the warehouse asks you to get a forklift and finish loading some boxes. There are three of them, and one is defective. You are instructed to put a safety tag on the defective forklift before you begin operating another one. What color of tag should be put on the forklift?

   ____

5. A co-worker has splashed pesticide in her eyes. As you look for the eye-wash station, what color safety tag would mark it?

____

6. You are told to put a safety tag on a small paint container. What color tag would you put on the container?

____

ASSIGNMENT SHEET 3

PROVIDING FOR HEALTH AND SAFETY IN THE WORKPLACE

II

NAME ______________________________ SCORE ________

OBJECTIVE 19

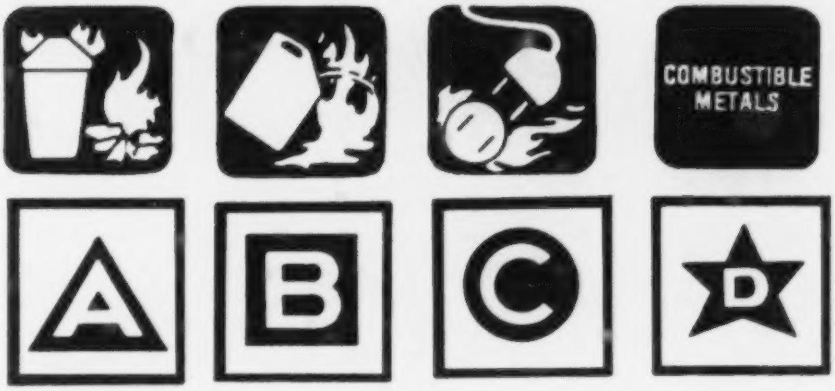
Determine correct fire extinguishers to use for various classes of fires.

INTRODUCTION

It is important to be familiar with types of fire extinguishers and what classes of fires they can be used on. Often, a quick response with the proper fire extinguisher may take care of the situation before it becomes a problem, or keep the fire under control until the fire department arrives.

DIRECTIONS

Read the following fire situations and write the letter of the type of extinguisher to use for each in the blanks. Refer to the illustration below for types of fire extinguishers and classes of fires for which they are used.



____ 1. A wastebasket full of paper ignited by a cigarette

____ 2. Smoke from a stack of lumber

____ 3. A can of gasoline which has spilled and ignites from the flame of a propane space heater nearby

____ 4. A fire which started in the light fixture in the ceiling

____ 5. A fire involving combustible metals (iron, magnesium, sodium, potassium)

____ 6. A fire which started from a short in the wiring in a computer

ASSIGNMENT SHEET 1

1. The following are suggested criteria
    - Worker standing on creeper
    - Improperly stored gasoline
    - Worker wearing jewelry
    - Workers not wearing eye protection
    - Troublelight not secured
    - Electrical cord strung through work area
2. The following are suggested criteria
    - Rags improperly stored
    - Worker not wearing ear protection
    - Ink spilled on floor causing slick spot
    - Long hair not confined around power equipment or while working around moving parts
    - Worker wearing jewelry
    - Hazardous for other workers
3. The following are suggested criteria
    - Frayed electrical cords
    - Improper tool storage
    - Electrical hazards in wet areas
    - Fire and chemical hazard

ASSIGNMENT SHEET 2

1. Federal safety black and white
2. Federal safety purple (or magenta or black on safety yellow)

3. Federal safety yellow or blue
4. Federal safety yellow
5. Federal safety green
6. Federal safety red

ASSIGNMENT SHEET 3

1. A
2. A
3. B
4. C
5. D
6. C

133

JOB SHEET 1

PROVIDING FOR HEALTH AND SAFETY IN THE WORKPLACE

OBJECTIVE 20

Properly lift a heavy object.

INTRODUCTION

One of the most painful and common injuries in any workplace is a back injury from using improper lifting techniques. Related injuries also occur as torn or strained muscles, ligaments, and joints in the neck, arms, or legs. Perhaps the saddest thing about such injuries, besides the fact that most could be easily avoided, is that most never heal completely. A back that has been injured once is likely to cause problems again even though the person is more careful than before. Some workers try to show off by lifting objects that are too heavy or too awkward to be handled safely, while others are just embarrassed to ask for help. However, the truth is that no one is impressed when the show-off ends up in the hospital, and the embarrassment and inconvenience are much greater when co-workers must do the job of an injured worker.

The key to proper lifting is to hold your back straight while lifting with properly positioned legs. This procedure sheet outlines the proper way to lift a heavy object.

NOTE: Review Supplement 2 before starting this exercise.

EQUIPMENT AND MATERIALS

- Heavy object

PROCEDURE

1. Approach the load and size it up (weight, size and shape). Consider your physical ability to handle the load.
2. Place the feet close to the object to be lifted. 8 to 12 inches apart for good balance.
3. Bend the knees to the degree that is comfortable and get a good hand-hold.
4. Using both leg and back muscles lift the load straight up—smoothly and evenly. Pushing with your legs, keep load close to your body.
5. Lift the object into carrying position, making no turning or twisting movements until the lift is completed.

6. Turn your body with changes of foot position after looking over your path of travel making sure it is clear.

7. Setting the load down is just as important as picking it up. Using leg and back muscles, comfortably lower load by bending your knees. When load is securely positioned, release your grip.

Steps are from the National Institute for Occupational Safety and Health, Cincinnati, Ohio.

JOB SHEET 1

Properly lift a heavy object.

Student's name ________________________ Date __________

Evaluator's name ______________________ Attempt no. _____

Instructions: When you are ready to perform this task, ask your instructor to observe the procedure and complete this form. All items listed under "Process Evaluation" must receive a "Yes" for you to receive an overall performance evaluation.

PROCESS EVALUATION

Evaluator note: Write a check mark in the "Yes" or "No" blanks to designate whether or not the student has satisfactorily achieved each step in this procedure. If the student is unable to achieve this competency, have the student review the materials and try again.

The student:	YES	NO
1. Used proper lifting techniques to assure own safety while lifting.	_____	_____
2. Successfully completed each required step.	_____	_____
3. Performed steps in correct sequence.	_____	_____
4. Object moved and set down without damage to object or surrounding area or personnel.	_____	_____

EVALUATOR'S COMMENTS

____

____

____

PRODUCT EVALUATION

Evaluator note: Rate the student on the following criteria by circling the appropriate numbers. Each criterion must receive a rating of "4" to demonstrate student mastery. (See performance evaluation key). A student who is unable to demonstrate mastery should review the material and submit another product for evaluation.

Criteria:				
Properly lifted object	4	3	2	1

EVALUATOR'S COMMENTS

AVERAGE RATING

Evaluator note: To obtain an average rating for the competency profile, total the designated points in "Product Evaluation" and divide by the total number of criteria. Circle the rating on the "Performance Evaluation Key" below.

PERFORMANCE EVALUATION KEY

4 - Skilled—Can perform job with no additional training
3 - Moderately skilled—Has performed job during training program; limited additional training may be required
2 - Limited skill—Has performed job during training program; additional training is required to develop skill
1 - Unskilled—Is familiar with process; but is unable to perform job

WRITTEN TEST

PROVIDING FOR HEALTH AND SAFETY IN THE WORKPLACE

II

NAME ______________________________ SCORE ________

OBJECTIVE 1

Match terms associated with general safety practices to their correct definitions. Write the correct letters in the blanks.

____ 1. Freedom from danger, risk, or injury

____ 2. To put out a fire; to cause to cease burning

____ 3. Any suddenly occurring, unintentional event that causes injury or property damage

____ 4. Capable of bursting into flames; such liquids reach their flashpoint at temperatures of 100° F or higher

____ 5. Failure to think before one acts; failure to pay attention

____ 6. Capable of being easily ignited and burning quickly; such liquids reach their flashpoint at temperatures below 100° F

____ 7. Temperature at which a flammable or combustible liquid generates enough gases to form an ignitable mixture in air

a. Accident

b. Carelessness

c. Combustible

d. Recklessness

e. Soundness

f. Extinguish

g. Flammable

h. Repel

i. Safety

j. Flashpoint

OBJECTIVE 2

State reasons why safety practices and procedures are needed. Write five reasons in the space provided.

____

____

____

____

____

OBJECTIVE 3

State general job safety rules. Write the number of rules listed for each category.

General (State three rules)

Dress (State four rules)

Equipment and tools (State six rules)

Work area (State four rules)

Flammable materials and toxic substances (State four rules)

OBJECTIVE 4

Distinguish between colors of the safety color code and their correct applications. Write...
"FSR" before applications for Federal Safety Red;
"FSY" before applications for Federal Safety Yellow;
"FSO" before applications for Federal Safety Orange;
"FSB" before applications for Federal Safety Blue;
"FSG" before applications for Federal Safety Green, and
"FSBW" before applications for Federal Safety Black and White in the blanks.

____ 1. Indicates caution and marks physical hazards that may result in accidents from slipping, striking against, falling, etc.

____ 2. Indicates storage areas.

____ 3. Warning tags that indicate equipment that should **not** be moved while unloading.

____ 4. Indicates danger.

____ 5. Indicates traffic flow paths.

____ 6. Identifies dangerous parts of equipment that could cut, crush, shock, or otherwise injure.

____ 7. Identifies portable containers of flammable liquids.

____ 8. Indicates equipment that should **not** be started, used, or moved.

____ 9. Indicates safety starter buttons.

___ 10. Identifies housekeeping equipment and its location.

___ 11. Identifies the starting point or power source for machinery.

___ 12. Indicates radiation hazards.

___ 13. Indicates waste containers for explosive or combustible materials.

___ 14. Identifies emergency stop bars, stop buttons, and electrical stop switches on machinery.

___ 15. Identifies safety equipment other than fire fighting equipment and its location.

___ 16. Identifies first aid equipment and its location.

___ 17. Identifies fire protection equipment and its location.

___ 18. Indicates slow-moving vehicles (25 mph or slower).

___ 19. Used on information signs and bulletin boards (not of a safety nature).

___ 20. Also used as contrasting sign.

OBJECTIVE 5

Name the components of the fire triangle. Write your answers in the spaces below.

____

____

____

OBJECTIVE 6

Match classes of fires to their correct descriptions. Write the correct letters in the blanks.

____ 1. Fires that occur in or near electrical equipment such as motors, switchboards, computers, and electrical wiring

____ 2. Fires that occur with combustible metals such as iron, magnesium, sodium, and potassium

____ 3. Fires that occur in ordinary combustible materials such as paper, wood, rags, rubber, and plastics

____ 4. Fires that occur with flammable liquids such as gasoline, oil, grease, paint, and solvent

a. Class A

b. Class C

c. Class B and C

d. Class B

e. Class A and C

f. Class D

OBJECTIVE 7

Match pictorial labels of fire extinguishers to the class of fire for which each is used. Write the correct letters in the blanks under the illustrations.

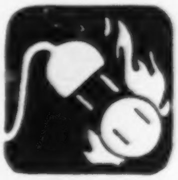
Class of fire

A

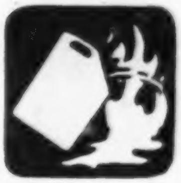
B

C

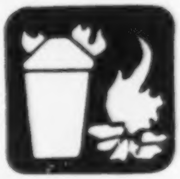
D



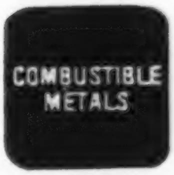
1. ____________



2. ____________



3. ____________



4. ____________

OBJECTIVE 8

Arrange in order procedures used to correctly lift a heavy object. Write a "1" before the first step, a "2" before the second step, and so on.

___ Bend the knees to the degree that it is comfortable and get a good hand-hold.

___ Lift the object into carrying position, making no turning or twisting movements until the lift is completed.

___ Approach the load and size it up (weight, size and shape). Consider your physical ability to handle the load.

___ Using both leg and back muscles lift the load straight up—smoothly and evenly. Pushing with your legs, keep the load close to your body.

___ Place the feet close to the object to be lifted 8 to 12 inches apart for good balance.

___ Turn your body with changes of foot position after looking over your path of travel making sure it is clear.

___ Using leg and back muscles, comfortably lower load by bending your knees. When load is securely positioned, release your grip.

OBJECTIVE 9

List items to consider when planning emergency evacuation procedures. Write four items to consider in the space provided.

OBJECTIVE 10

List the purposes of the Occupational Safety and Health Administration. Write four purposes in the space provided.

OBJECTIVE 11

Select from a list features of worker's compensation insurance. Write an "X" in the blank before each true statement.

____ 1. Cost is paid by employee.

____ 2. Treatment for any injury or disease is covered.

____ 3. Employer may purchase insurance from a private company or a state owned fund.

____ 4. Only injuries which occur on the job are covered.

____ 5. Compensation benefits are provided for six-month disabilities.

____ 6. In case of death, compensation benefits are provided for surviving dependents.

____ 7. Compensation benefits are provided for temporary and permanent disabilities.

OBJECTIVE 12

Discuss how hazardous materials enter the body and precautions which should be taken.

OBJECTIVE 13

List symptoms of pesticide poisoning. List three symptoms for each level of pesticide poisoning.

1. Mild poisoning

___

___

___

2. Moderate poisoning

___

___

___

3. Severe poisoning

___

___

___

OBJECTIVE 14

List steps to prevent misuse of pesticides. List the four steps in the space provided.

___

___

___

___

___

___

___

___

___

___

___

147

OBJECTIVE 15

List guidelines for pesticide safety. List eight guidelines in the space provided.

OBJECTIVE 16

Name information found on a pesticide label.
Write the correct names in the blanks on the label shown on the next pages.

Ingredient statement
Net contents
Name and address of manufacturer
Registration and establishment numbers
Use classification
Directions for use
Precautionary statement
Signal words and symbols
Trade or brand name
Common name
Chemical name
Re-entry statement
Storage and disposal directions
Physical or chemical hazards
Statement of practical treatment

D·z·n®

1. ____________________

Active Ingredients:
O, O-diethyl O-(2-isopropyl-6-methyl-4-pyrimidinyl) phosphorothioate..................48%

2. ____________________

Five Gallons

U.S. Standard Measure

3. ____________________

Warning

See additional warning statements left of container seam.

4. ____________________

EPA Est. 100-AL-1
EPA Reg. No. 100-461

Control No. 52200

See directions for use on panel at right.

5. ____________________

Insecticide

For control of certain insects on fruits, nuts, vegetables, field crops, and ornamentals

Sample label used with permission of CIBA-GEIGY Corporation

149

Diazinon AG500

6. ______________________

Active Ingredients:

O, O-diethyl O-(2-isopropyl-phosphorothioate	**48%**
Xylene	**36%**
Inert Ingredients:	**16%**
Total:	**100%**

7. ______________________

Directions for Use

It is a violation of federal law to use this product in a manner inconsistent with its labeling.

8. ______________________

Fruit and Nut Crops

Note: Unless otherwise stated, the following rates should be applied as a dilute full cover spray.

Almonds

Mites, Twig Borers: Apply 1-1½ pts. per 100 gals. of water.

Parlatoria Scales, San Jose Scales: Mix 1-1½ pts. D•z•n Diazinon AG500 plus 2-3 gals. dormant oil per 100 gals. of water and apply as a dormant spray.

Almond hulls may be used for feed for livestock.

9. ______________________

Note: The California Department of Agriculture has set a 5-day reentry for Diazinon on citrus, grapes, peaches, and nectarines. Five days should elapse between the time of application and the time a worker may enter the field to engage in any activity requiring substantial contact with treated foliage. When a mixture of two or more organic phosphate pesticides is applied, the interval shall be prolonged by adding to the longest applicable interval an additional 50% of that interval.

10. ______________________

Statement of Practical Treatment

If swallowed, call a physician immediately. DO NOT INDUCE VOMITING UNLESS NO OTHER TREATMENT IS AVAILABLE. Vomiting may cause aspiration pneumonia. If it is necessary to induce vomiting, give victim one or two glasses of water and insert finger in back of throat. Repeat until vomit fluid is clear. Do not induce vomiting or give anything by mouth to an unconscious person.

If inhaled, remove victim to fresh air and apply artificial respiration if indicated.

If on skin, wash promptly with soap and water. Rinse thoroughly.

If in eyes, rinse eyes for at least 15 minutes with water and call a physician immediately.

Note to Physician: Gastric lavage is indicated. Atropine sulfate and 2-PAM are specific antidotes.

Environmental Hazards

This product is toxic to fish, birds, and other wildlife. Birds feeding on treated areas may be killed. Keep out of lakes, streams, ponds, tidal marshes, and estuaries (except for affluence from treated watercress beds). Do not apply to water that will be used for recreational purposes and human and livestock consumption. Shrimp and crab may be killed at application rates recommended on this label. Do not apply where fish, shrimp, crab, and other aquatic life are important resources. This product must not be used in areas where impact on threatened endangered species is likely. Contact your State Fish and Game Agency for information pertaining to areas having threatened endangered species. Apply this product only as specified on this label.

This pesticide is highly toxic to bees exposed to direct treatment or to residues remaining on the treated area. Do not apply when bees are actively visiting the crop, cover crop, or weeds blooming in the treatment area. Applications should be limited to provide the maximum possible interval between treatment and the next period of bee activity.

11. ______________________________

Physical or Chemical Hazards

Do not use, pour, spill, or store near heat or open flame.

12. ______________________________

Storage and Disposal

Do not contaminate water, food, or feed by storage or disposal. Open dumping is prohibited. Pesticide, spray mixture, or rinsate that cannot be used or chemically reprocessed should be disposed of in a landfill approved for pesticides or buried in a safe place away from water supplies. Reseal container and offer for reconditioning, or triple rinse (or equivalent) and offer for recycling, reconditioning, or disposal in approved landfill, or bury in a safe place. Consult federal, state, or local disposal authorities for approved alternative procedures.

13. ______________________________

Precautionary Statements

Hazards to Humans and Domestic Animals

WARNING

May be fatal if swallowed. May be absorbed through skin. Do not breathe spray mist. Do not get in eyes, on skin, or on clothing. Wash thoroughly after handling. Avoid contamination of food. Do not use on humans or permit children to go onto sprayed grass until spray has completely dried.

Keep out of reach of domestic animals. Do not contaminate feed or use on household pets or livestock. Do not permit pets to go onto sprayed grass until spray has completely dried.

14. ______________________________

Agricultural Division
CIBA-GEIGY Corporation
Greensboro, NC 27409
CGA 1L83C 060

15. ______________________________

151

NOTICE: The following assignment sheets and job sheet are not a part of the written test. If these activities have not been completed, check with your instructor.

OBJECTIVE 17 **Analyze situations to determine correct safety practices.** SCORE _______

OBJECTIVE 18 **Determine colors used in the safety color code from given situations.** SCORE _______

OBJECTIVE 19 **Determine correct fire extinguishers to use for various classes of fires.** SCORE _______

OBJECTIVE 20 **Demonstrate the ability to properly lift a heavy object.** RATING ______

OBJECTIVE 1

1. i
2. f
3. a
4. c
5. b
6. g
7. j

OBJECTIVE 2

Answer should include any five of the following:

- To prevent physical harm to yourself and others
- To avoid loss of work
- To avoid possible loss of pay
- To lower cost to employer
- To prevent loss of or damage to equipment and/or materials
- To lower insurance rates
- To prevent hardship on family
- To provide regular job schedules
- To prevent possible loss of job

OBJECTIVE 3

GENERAL (Answer should include any three of the following)

- Know correct emergency telephone numbers in your area; be sure they are posted near the telephone.
- Be alert and conduct yourself in a safe manner.

- **Be aware of where others are in the shop or store and of what they are doing.**

- **Be familiar with the location of fire fighting and first-aid equipment.**

- Report all accidents to your instructor, no matter how minor they may seem.

DRESS (Answer should include any four of the following)

- Wear close-fitting clothing appropriate for the work being done.

- Confine long hair before using power equipment or working around moving parts.

- Wear safety equipment when required.

- Remove rings and other jewelry before going into shop.

- Do **not** carry tools or sharp objects in your pockets.

EQUIPMENT AND TOOLS (Answer should include any six of the following)

- Obey all safety rules and operating instructions provided by equipment manufacturer, plus any additional ones used for shop.

- Keep tools clean and in good working order.

- Properly store tools and equipment when not in use.

- Keep guards and safety devices in place on all equipment.

- Tag and report to the supervisor any defective tools, machines, or equipment.

- Turn off power equipment when not in use.

- Operate equipment only after receiving training on how to use it properly and safely.

- Disconnect power equipment from power source before changing accessories or performing maintenance on it.

- Use the correct tool for the job.

154

- **Never** use compressed air to clean yourself or your clothing; do **not** direct compressed air toward your body or another person.

WORK AREA (Answer should include any four of the following)

- Arrange equipment and vehicles to allow safe working practices and ease of cleaning.
- Store materials and supplies safely in their proper places.
- Store tools and accessories safely in suitable storage containers or areas.
- Keep regular entrance doors in good condition - adjust door checks to close slowly.
- Keep work area organized and clear of debris and other hazards.
- Keep display counters, stands, and gondolas free of nails, splinters, broken glass, etc.
- Clear floors of obstacles and slippery substances; clean up spills immediately.
- Check for open carpet seams; tears or folds in carpet, holes in flooring, etc.
- Keep aisles, exits, and traffic areas free of materials and debris. Keep sidewalk and driveway surfaces in good repair.
- Dispose of combustible materials properly.
- Keep enough brooms, brushes, waste containers, and housekeeping supplies on hand to keep the work area clean.

FLAMMABLE MATERIALS AND TOXIC SUBSTANCES (Answer should include any four of the following)

- Carefully read and follow label directions for flammable liquids and toxic substances; use only in well-ventilated areas.
- Avoid breathing fumes from flammable liquids and toxic substances.

- Be sure that flammable liquids and toxic substances are properly marked and stored.

- Have at work area only the amount of flammable liquid or toxic substances needed for the job being done.

- Immediately change clothing on which flammable or toxic materials have been spilled.

- Use flammable liquids and toxic substances only for their intended purposes.

- If your hair or clothing catches fire, do **not** run; **stop**, **drop**, and **roll** to smother the fire, using a blanket, fender cover or whatever is available.

- Do **not** use flammable materials near a fire or flame.

OBJECTIVE 4

1. FSY
2. FSBW
3. FSB
4. FSR
5. FSBW
6. FSO
7. FSR
8. FSY
9. FSO
10. FSBW
11. FSY
12. FSP
13. FSY
14. FSR
15. FSG
16. FSG
17. FSR
18. FSO
19. FSB
20. FSBW

OBJECTIVE 5

1. Fuel
2. Heat
3. Oxygen

OBJECTIVE 6

1. b
2. f

3. a
4. d

OBJECTIVE 7

1. C
2. B
3. A
4. D

OBJECTIVE 8

3, 5, 1, 4, 2, 6, 7

OBJECTIVE 9

Answer should include four of the following:

- Have a predetermined plan for evacuation.
- Practice plan periodically and modify as necessary.
- Designate an area away from facility for employees to meet.
- Assign team leaders to direct evacuation and to account for all employees and customers.
- Make sure all exits are clearly marked and free of clutter which could hamper the evacuation process.
- Stress the importance of remaining calm.

OBJECTIVE 10

Answer should include any four of the following:

- Encourage employers and employees to reduce workplace hazards and to implement new or improve existing safety and health programs.
- Provide for research in occupational safety and health to develop innovative ways of dealing with occupational safety and health problems.
- Establish "separate but dependent responsibilities and rights" for employers and employees for the achievement of better safety and health conditions.

- Maintain a reporting and recordkeeping system to monitor job-related injuries and illnesses.
- Establish training programs to increase the number and competence of occupational safety and health personnel.
- Develop mandatory job safety and health standards and enforce them effectively.
- Provide for the development, analysis, evaluation, and approval of state occupational safety and health programs.

OBJECTIVE 11 3, 4, 6, 7

OBJECTIVE 12 Discussion should include the following:

Inhalation—Breathing hazardous materials.

Precautions against inhalation of hazardous materials

- Use adequate and proper ventilation.
- Wear personal protective equipment.

Absorption—Being exposed to a hazardous material through the skin.

Precautions against absorption of hazardous materials

- Wear personal protective equipment.
- Keep hazardous substances in designated areas only.
- Clean up spills and leaks immediately.
- Avoid direct contact with a hazardous material—wash thoroughly after contact.

Ingestion—Swallowing something that has become contaminated; touching the mouth with a hand after contact with a hazardous substance.

Precautions against ingestion of hazardous materials

- Keep hazardous substances in designated areas only.

- Wear personal protective equipment.
- Wash thoroughly after contact and before touching anything.
- Allow no food items in work areas with hazardous substances.

OBJECTIVE 13

Answers may include any three of the following from each category:

- **Mild poisoning**—Irritation of the skin, nose, throat, and eyes; weakness, dizziness, headache, nausea, diarrhea
- **Moderate poisoning**—Difficult breathing, blurred vision, rapid pulse, flushed skin, stomach cramps, vomiting, muscle twitches, poor muscle coordination, constricted pupils
- **Severe poisoning**—Convulsions, loss of consciousness, secretions from nose and mouth, inability to breathe, often accompanied by fever; MAY BE FATAL

OBJECTIVE 14

Answer should include the following:

- Properly identify the pest problem and determine what pesticide to use. Seek an expert's advice if in doubt.
- Apply the recommended material according to the labeled instructions.
- Store pesticides in their original labeled containers in a locked storage area out of the reach of children, pets, and livestock.
- Dispose of empty containers promptly, safely, and according to the law.

OBJECTIVE 15

Answer should include eight of the following:

- Read the manufacturer's label carefully and completely.
- Wear clean protective clothing and equipment as required.
- Do not eat, drink, or smoke while handling pesticides.

- Avoid ingesting or inhaling pesticides; avoid skin contact with pesticides.
- If concentrates or dilute pesticides are spilled on the skin or clothing, remove the clothing at once and wash the skin thoroughly with soap and water.
- Always mix pesticides in an open area where ventilation is adequate; never mix pesticides in a enclosed area.
- Never use the hands and arms to stir pesticides or to reach into a container of pesticides to retrieve tools or other items dropped into them.
- Never use sprayers with leaking hoses or connections. Keep application equipment in proper working condition.
- Never allow drift onto neighboring fields. Remove pets and livestock from areas to be treated.
- Never spray directly into the wind or overhead.
- When application equipment is not being used, keep it in an area where children and livestock cannot get to it.
- Wash spray equipment after each use to avoid hazardous accumulation.
- Never contaminate fish ponds, streams, or lakes.
- Store pesticides in the original labeled containers away from food, feed, seed, fertilizers, or medicine, and out of reach of children, pets, and livestock. Use a storage area that can be locked.
- Never guess what is in the pesticide container. If the label has been damaged or removed, discard the entire container with its contents.
- Dispose of empty containers promptly and safely.
- Call a doctor or get the patient to a hospital immediately if the symptoms of poisoning occur during or shortly after spraying or dusting. Carry the pesticide label or labeled container with you.

OBJECTIVE 16

1. Trade or brand name

2. Chemical name
3. Net contents
4. Signal words and symbols
5. Registration and establishment numbers
6. Common name
7. Ingredient statement
8. Use classification
9. Directions for use
10. Re-entry statement
11. Statement of practical treatment
12. Physical or chemical hazards
13. Storage and disposal directions
14. Precautionary statement
15. Name and address of manufacturer

OBJECTIVES 17 through 19 Refer to answers to Assignment Sheets 1 through 3.

OBJECTIVE 20 Refer to Practical Test for Job Sheet 1.

OBJECTIVE SHEET

PROVIDING FOR PERSONNEL AND STORE SECURITY

III

INTRODUCTION

The profit drain caused by internal theft, shoplifting, robberies, and burglaries is perhaps the most critical problem confronting today's business organizations.

These crimes, with their economic impact on business firms, have reached such proportions that it has forced many firms out of business. Others are reporting inventory losses due to theft and error as high as 5% of gross sales. Some firms are reporting losses equal to or, in some cases, exceeding gross profits. Only a few retailers are reporting losses at less than 1% of sales.

Business owners, managers, employees, and consumers all feel the economic impact of this *multi-billion dollar* problem. Millions of dollars have been spent on electronic surveillance devices, security personnel, new inventory control systems, new procedures, policies, etc. In spite of all these efforts, the problem continues to grow.

A basic assumption of this unit is that the ultimate solution to this problem rests in the vast reservoir of experience and wisdom of employees. Therefore, this unit deals with the basic employee skills necessary for achieving a reduction in losses through people.

UNIT OBJECTIVE

After completing this unit, the student should know personnel security practices to prevent robberies, burglaries, shoplifting, and internal theft. The student will demonstrate these competencies by completing the assignment sheets and written test with a minimum of 85 percent accuracy.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to

1. Match terms associated with personnel and store security to their correct definitions.
2. Select from a list true statements concerning recommended opening and closing procedures for business establishments.
3. Select from a list techniques for the prevention of burglaries and robberies.
4. Name ways to prevent violence during a robbery.
5. Select from a list true statements concerning the correct procedure for reporting a robbery.

6. Select from a list types of information included on a crime fact sheet.
7. Match the common methods of internal theft with the appropriate counter measures to prevent or reduce internal theft.
8. List behaviors typical of shoplifters.
9. List guidelines for preventing shoplifting.
10. List guidelines for approaching a suspected shoplifter.
11. Complete a crime fact sheet. (Assignment Sheet 1)
12. Analyze case studies to determine correct security practices. (Assignment Sheet 2)

SUGGESTED ACTIVITIES

PROVIDING FOR PERSONNEL AND STORE SECURITY

III

PREPARATION

- Obtain materials to supplement unit.

  NOTE: See Suggested Resources.

- Review instructional outline for this unit. Modify time frames to suit class needs and plan activities for each class period.

- Study the specific objectives to determine those you will cover in your presentation. Decide also which objectives should be taught to which students.

- Determine scope and sequence of objectives that you add. Design and develop support materials, including evaluation techniques, for additional objectives.

- Determine how you will schedule time for students to demonstrate competence in the required procedures.

- Make arrangements for guest speakers. Supply speakers with specific objectives and other appropriate sections of the unit.

- Make arrangements for person or persons to stage a robbery in your classroom.

- Prepare classroom.
  - Put up posters, charts, etc., dealing with general security practices.
  - Have articles, brochures, and other items dealing with the importance of general security practices.

DELIVERY

Objective 1

- Discuss unit and specific objectives. Use Teacher Supplement 1.

- Survey the class to find out their knowledge of store and personnel security practices and their perceptions regarding the need for both. Find out if students have ever been or worked in a store in which such an event occurred. If so, ask students what practices were used and how the situation could have been prevented.

- Discuss terms and definitions. Invite the public information officer or a representative from your local police department to speak on business-related crimes and ways to discourage criminals.

- Review Supplement 1.

Objective 2

- Have students develop "all clear" and "warning" signals to use when opening a business. Both a verbal command and a gesture should be used.

- Discuss why it is a good idea **not** to close a business alone.

- Discuss with students how certain parking procedures may protect employees who leave work after dark.

- Provide students with Handouts 1, 2, and 3, if desired.

- Invite a police officer from the local police department to speak to the class about the topics in the handouts, especially Handout 2. Have the police officer discuss the option of resisting an attack. Have the police officer discuss pros and cons of each choice. Have the class discuss.

Objective 3

- Invite a police officer from the local police department to discuss the prevention of burglaries and robberies.

- Use Transparency Master 1 to discuss the most important reasons why robberies are committed. Before showing Transparency Master 1, have students rank factors in committing a robbery. After showing the transparency, discuss differences in students' opinions and survey results as shown on the transparency.

- Provide students with Handout 4, if desired.

- Discuss the importance of keeping all information about the business confidential, so that individuals do not have the opportunity to overhear information (such as how much money is on hand or when the safe is unlocked) and then rob or burglarize the store.

Objective 4

- Invite a police officer from the local police department to speak to class about how violence can be prevented during a robbery. Have police officer discuss examples of common weapons used in crimes.

- Provide students with Handouts 5 and 6, if desired. Use Transparency Master 2. Emphasize to students that rape is a crime of violence and one that might occur during a robbery or burglary.

Objective 5

- Have students make a list of all emergency phone numbers (police, fire department, ambulance, etc.) of locations near their home or place of work. Instruct students to keep the list near the phone.

- Stress the importance of remaining calm when reporting a crime such as a robbery. Emphasize that evidence should not be touched.

Objective 6

- Use Transparency Master 3 to discuss types of information that could help identify robbers. Have a robbery staged in class by persons with whom the students are unfamiliar. Have students complete Assignment Sheet 1.

- Observe how well students followed guidelines in Objectives 4 through 6. Discuss with students.

Objective 7

- Discuss internal theft and how it contributes to increased cost to business.

Objectives 8 and 9

- Invite a store manager or local police officer to discuss shoplifting prevention techniques. Stress that this activity, although seemingly harmless to others, can result in a police record for the shoplifter, profit drain on the store, and higher prices for the consumer.

- Review your state's statutes on shoplifting. (Oklahoma statutes are included in Supplement 2). Provide students with Handout 7; if desired.

- Have students complete Assignment Sheet 2.

Objective 10

- Invite a store manager to discuss guidelines for approaching a suspected shoplifter. Have speaker emphasize that before approaching someone, you must be sure you actually saw merchandise taken and concealed.

APPLICATION

Objectives 11 and 12

- Use Assignment Sheet 1 to give students practice in completing a crime fact sheet.
- Use Assignment Sheet 2 to give students practice in analyzing store and personnel security practices. Select a few of the better papers and discuss answers with class.

EVALUATION

Written Test

- Explain to students that they will be asked to demonstrate on the written test actions listed in the specific objectives.
- Give written test.

  NOTE: The written test may be given in sections if desired.
- Evaluate students on assignment sheet activities if not previously done.
- Reteach and retest if necessary.
- Complete appropriate section of competency profiles.
- Review individual and group performance in order to evaluate teaching methods. Adjust scope, sequence, or instructional approaches for additional lessons as required.

SUGGESTED RESOURCES

Audiovisual Materials

- *Armed Robbery: Prepare to Survive*, Color, 1/2-inch VHS, 20 minutes, Aims Media, Inc., 1985. Available from Aims Media, Inc., 6901 Woodley Ave., Van Nuys, CA 91406, (800-367-2467). This film emphasizes personal safety—how to prepare for dealing with a robbery situation and how to prevent it.

  NOTE: The above video is available to Oklahoma teachers on a free-loan basis. Oklahoma teachers may order this video from the Oklahoma Department of Vocational and Technical Education, Resource Center, ATTN: Instructional Media Specialist, 1500 West Seventh Avenue, Stillwater, OK 74074-4364. Oklahoma teachers may call 1-800-522-5810. Out-of-state teachers must order from the addresses listed with the video.

- *Caught*, National Retail Merchants Association, 24 minutes. Available from National Retail Merchants Association, 100 West 31st Street, New York, NY 10001. This film depicts a teenage shoplifter, the misunderstanding of the seriousness of an act of theft, her reactions and those of parents and community.

- *Mission: Less Prevention*, National Retail Merchants Association, 25 minutes, color, 16 mm, 1/2 inch VHS. Available from National Retail Merchants Association, 100 West 31st Street, New York, NY 10001.

- *The Ten Billion Dollar Ripoff*, National Retail Merchants Association, 22 minutes, color, 16 mm, 1/2 inch VHS. Available from National Retail Merchants Association, 100 West 31st Street, New York, NY 10001. This film is designed to combat employee theft and is geared specifically for the new employer.

Publications

- Obtain booklets, pamphlets, posters, etc. from local agencies such as YWCA, Rape Crisis Center, Domestic Violence Center, and local law enforcement agencies.

- *Loss Prevention Checklist*, Available from National Retail Merchants Association, 100 West 31st Street, New York, NY 10001.

- *Crime in the United States*, 1988, Uniform Crime Reports, Federal Bureau of Investigation, U.S. Department of Justice, Washington, D.C. 20535.

- *Crime in Oklahoma*, Uniform Crime Reports 1988, Oklahoma State Bureau of Investigation, P.O. Box 11497, Oklahoma City, OK 73136.
- *Mind Your Business . . . If You Don't, Burglars Will!*, State Farm Fire and Casualty Company, Bloomington, Illinois 61701.
- Scriptographic Booklets. Channing L. Bete Co, Inc., 200 State Road, South Deerfield, MA 01373-0200.
  - *ABC's of Self-Protection.*
  - *Thirty Ways You Can Prevent Crime.*
  - *Women and Self Protection.*
  - *About Rape.*
- *Taking Action: What To Do If You Are Raped*, Available from Rape Treatment Center, Santa Monica Hospital Medical Center, 1225 Fifteenth Street, Santa Monica, CA 90404.

UNIT REFERENCES

- *Crime in Oklahoma*, Uniform Crime Reports 1988, Oklahoma State Bureau of Investigation, P.O. Box 11497, Oklahoma City, OK 73136.
- *Crime in the United States*, 1988, Uniform Crime Reports, Federal Bureau of Investigation, U.S. Department of Justice, Washington, D.C. 20535.
- Huston, Jane, *Personnel Security*, Mid-America Vocational Curriculum Consortium, Inc., Stillwater, Oklahoma, 1987.
- *Loss Prevention Checklist*, National Retail Merchants Association, 100 West 31st Street, New York, NY 10001.

CRIME FACTORS

The presence of crime in our Nation is a matter of serious concern not only to the law enforcement profession, but to society at large. Historically, the causes and origins of crime have been the subjects of investigation by varied disciplines. Some factors affecting the volume and type of crime occurring from place to place are:

- Population density and degree of urbanization with size of locality and its surrounding area
- Variations in composition of the population, particularly youth concentration
- Stability of population with respect to residents' mobility, commuting patterns, and transient factors
- Modes of transportation and highway systems
- Economic conditions, including median income, destitution, and job availability
- Cultural conditions, such as educational, recreational, and religious characteristics
- Family conditions with respect to divorce and family cohesiveness
- Climate
- Effective strength of law enforcement agencies
- Administrative and investigative emphases of law enforcement. Policies of other components of the criminal justice system (i.e., prosecutorial, judicial, correctional, and probational)
- Attitudes of citizenry toward crime
- Crime reporting practices of citizenry

Source: *Crime in the United States.*

BASIC SKILLS

The following table identifies the basic academic skills that are reinforced in this unit of instruction. These basic academic skills were identified using *The Basic/Essential Skills Taxonomy*, 2nd ed. and verified during the validation process.

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 1	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 2	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 3	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 4	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 5	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 6	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 7	Language Arts 013	Applies/Uses	Definitions	
	Science 042	Applies/Uses	Maps/charts/ tables/graphs	
	Language Arts 132	Comprehends	Information- written	
	Language Arts 038	Collects/ Organizes	Information- oral/written	
OBJECTIVE 8	Language Arts 132	Comprehends	Information- written	
	Language Arts 038	Collects/ Organizes	Information- oral/written	
OBJECTIVE 9	Language Arts 132	Comprehends	Information- written	
	Language Arts 038	Collects/ Organizes	Information- oral/written	
OBJECTIVE 10	Language Arts 132	Comprehends	Information- written	
	Language Arts 038	Collects/ Organizes	Information- oral/written	
	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
OBJECTIVE 11	Language Arts 036	Attends	Nonverbal cues	
	Language Arts 037	Attends	Verbal cues	
	Science 047	Applies/Uses	Scientific methods	Observation direct/indirect
	Language Arts 058	Composes/ Edits	Forms/ documents	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 12	Mathematics 229	Solves problems	Generate conclusions	Deductive reasoning
	Language Arts 052	Composes/ Edits	Drafts oral/written	
	Language Arts 133	Comprehends	Information-written	Cause/effect relationships

PRECAUTIONS FOR WALKING HOME AFTER DARK

- Walk with another person if possible.
- Walk at a distance from alley entrances, store fronts, and shrubbery. Stay near the curb rather than close to buildings.
- Avoid parks or open fields.

CAUTION: Never take shortcuts through poorly lighted areas.

- Do not linger in deserted areas.
- Walk with head up, alert to people, movement, and sound around you.
- Don't carry a purse if at all possible; otherwise, carry your purse close to the body or under your coat.
- Walk on the side of the street facing oncoming traffic. This allows you to see any approaching car.
- Be wary if people in a car stop to ask directions.
- Never accept a ride from a stranger. Do not hitchhike!

NOTE: Accepting rides from strangers is equally hazardous for men and women.

- If approached by a stranger in a car, run in a direction opposite to the way the car is headed.
- Run to the nearest home or business and summon help if being pursued.

NOTE: Do not run to your own home. A pursuer would know where to find you.

- Scream for help; call out "FIRE" (you are more likely to get help). Do not hesitate if a threatening situation exists.

NOTE: If assaulted, report it to police immediately.

PRECAUTIONS FOR LEAVING WORK AFTER DARK

- Arrange for a friend or relative to drive you home.
- Make sure family member or roommate knows when you get off work and when you are expected home.
- Alert family or friend to changes in schedule.
- Familiarize yourself with employees of neighboring businesses.

  NOTE: Safety can be enhanced when community businesses join together in defense of criminal activities.
- Do not wear expensive jewelry or carry large amounts of cash or an excessive number of credit cards with you.

PRECAUTIONS TO TAKE AGAINST POSSIBLE ATTACK

- Be aware of your surroundings at all times.
- Appear confident and assertive. Look like you know what you are doing.

  NOTE: Assailants usually seek someone who can be easily intimidated and overpowered.
- Listen to your intuition or "gut feelings."

  NOTE: If you feel danger, act on it.
- Dress practically. Tight or bulky clothing, high heels, etc. make running or struggling difficult.

  NOTE: The type of clothing you wear may also draw unfavorable attention to you.
- Keep your arms free or be prepared to drop bundles and run.

  NOTE: When your arms are full, you are more vulnerable to attack.
- Plan your method of resistance and practice until you feel comfortable with it.

  NOTE: Decide if you (personally) would be willing to risk escape, or if you would simply comply with the attacker's orders (and risk being killed).
- Stay in a public place if possible.

  EXAMPLE: Front of store

PRECAUTIONS FOR DRIVING HOME LATE AT NIGHT

- Always park by the door, or get an escort to the parked car.
- Always lock car doors to prevent entry by an unwanted passenger.
- Walk around car before getting in, to see if someone is underneath.

  NOTE: Someone under the car may grab you and cause you to lose your balance.
- Always have car key in hand.
- Never walk to car in a vacant or near-vacant lot if a van is parked next to it.

  NOTE: Someone in van may open sliding door, pull you into the van, and drive off.
- Check the backseat before entering car to be sure no one is hiding.
- Lock the doors once you have entered the car, and keep windows rolled up so no one can reach through the window.
- Do not turn your head or respond in any way if someone calls to you in the parking lot. Pretend you did not hear.
- Know where your local police station is and drive there if you are being followed.

  NOTE: Do not get out of the car. Honk the horn until an officer comes out.
- Never lead anyone to your home. If a police station is not nearby, go to a busy area of town and look for a police officer.
- Stay off deserted roads where you can be terrorized or run off the road.
- Make sure you have ample gasoline, a good battery, and sound tires to avoid possible breakdown.

- If you have a flat tire in a questionable area, drive on it until you reach a safe, well-lighted spot.

- In the event of car trouble, lift the hood of car to signal for help. Get back in the car promptly and lock the doors. Leave lights and emergency flasher on at night. If someone stops, lower window a crack and ask the person to call for assistance.

  WARNING: Never let a stranger in the car.

PRECAUTIONS FOR HANDLING MONEY

- Never allow money to build up in your register. Hourly checks of register should be made and excess money should be deposited in safe. Notify manager if a large sum of cash accumulates in cash drawer.

- Money drawers should be closed at all times when not in use.

- Do not discuss the amount of money handled in store with friends or customers.

- Be alert; do not let customers or disturbances draw your attention away from an open cash drawer. Close your cash drawer whenever a disturbance occurs.

- Pay full attention in all cash transactions. Concentrate on the amount of money received from the customer, the amount of purchase and, if appropriate, the amount of change to return to customer.

- Do not make change as part of a sale; handle as a separate transaction.

  NOTE: Management will determine policy on making change to customers.

WAYS TO PREVENT RAPE

- Carry an external form of defense at night such as a flashlight, whistle or umbrella.

  NOTE: It is suggested that you do not carry a knife or gun as these weapons could easily be taken away and used against you. A nail file, hairspray, car keys and/or your fingernails are useful weapons against attack.

- Cross the street often if you feel you are being followed.

- Avoid loitering in parking lots, libraries, public bathrooms, unlighted pathways, elevators, entry ways, unattended classrooms, and parking lots.

- Be aware of what is happening around you; think about protecting yourself and what you are going to do if a stranger approaches you.

- Do not panic if you find yourself in a rape situation. Scream, blow a whistle, or try to distract the attacker and run away.

- Fake being sick. Go into convulsions, pretend to have stomach pains, claim to have VD, AIDS, or your period, or fake a seizure.

- Talk to the attacker, call out to an imaginary friend in the distance, or tell the attacker you are expected home immediately.

- Do not allow your self-determination and control to be undermined by a relationship with the opposite sex. Be confronting and do not automatically assume that casual acquaintances are trustworthy. It is better to offend someone or appear foolish than to become a victim of rape.

- Fake fainting and collapse in rapist's arms if bodily contact is made.

- Use common sense, be alert, and be cautious. Be prepared in case you are victimized one day.

PROCEDURE TO FOLLOW IF RAPE OCCURS

- Remain calm enough to notice everything you can about rapist, where it occurred, and other evidence at scene of crime.
- Call police or Rape Crisis Center immediately after attack.
- Do not bathe, douche, or change clothes.
- Go to hospital emergency room for examination and medical care within 24 hours after assault.
- Call a friend or family member to be with you.
- Write down the physical characteristics of rapist and any information which may help in the police investigation.
- Seek counseling, assistance, and support through the local Rape Crisis Center.

TOOLS USED BY SHOPLIFTERS

- Boxes tied or wrapped like a regular suit box or other parcel but with a hinged top, bottom, or end
- Open bags or large purses
- Belts or harnesses to be worn under coats
- Work clothing bundled in a package
- Pants with full pockets
- Large-wristed gloves
- Musical instrument cases
- Helper coats with large pockets
- Pockets running the full length of the sleeve or large sleeves with cuff pockets
- Newspapers or magazines that are folded to hold compact disks, cassette tapes, or other items
- Umbrellas that are fitted with elastic bands that are attached to the ribs of the umbrella
- Cases that look like those carried by doctors
- Baby carriages; some have false bottoms and others are filled with blankets to cover articles that are stolen
- Maternity clothes—In some, the bulges are false and hold a lot of merchandise
- Books that are hollowed out to hold small items
- Dresses with pockets in the back of the neck so small articles can be dropped in while the shoplifter fixes his or her hair.
- Bandaged arms with false plaster casts

- Toilet tissue or paper toweling with one end open so that small articles can be put in the broken end

PROCEDURES FOR HANDLING TELEPHONE THREATS

Bomb threat

- Take bomb threats seriously.
- Remain calm.
- Listen to the caller carefully.
- Keep the caller talking while you alert other employees to situation.

  NOTE: If possible, get second employee on phone line to listen to conversation.
- Listen to characteristics of caller's voice.

  EXAMPLES: Male/female, tone, accent, speech impediment
- Ask for information pertaining to the bomb such as when it is set to explode, where it has been placed, what it looks like, and what type it is.
- Listen for any identifiable noises in background.
- Ask why bomb was placed in the facility and if there are any demands.
- Note the time of the call—when it began and ended.
- Write down the caller's exact words if possible.
- Contact your manager or supervisor immediately after call.
- Notify the local law enforcement agency.

  NOTE: Management is responsible for notifying police. However, time is important in the case of a bomb threat so it may be necessary for an employee to contact the police first.

- Offer investigating officers assistance in locating the bomb.

  NOTE: A manager or employee is more familiar with business surroundings and may be able to point out areas where bomb could be hidden and any items which should not be in the area.

  WARNING: No one should attempt to move, touch, examine, or disturb a bomb if it is located before trained personnel have arrived. Tampering with the device could result in its detonation and cause death or serious injury to employees and customers.

- Evacuate facility.

  NOTE: Follow predetermined evacuation procedure.

- Lock equipment containing cash and secure valuables if time permits.

- Do not return to facility until police have determined the threat was a hoax or until bomb has been removed.

Kidnap/hostage situation

  NOTE: This type of threat generally is limited to major banking institutions and corporate offices.

- Take kidnap/hostage situation seriously.

- Remain calm.

- Alert other employees, through prearranged signals, to the situation.

  NOTE: Security personnel, FBI, and police should be notified.

- Verify that the situation is real.

  - Have other employees try to locate alleged hostage at work, home, etc.

  - Ask to speak to hostage.

- Keep caller talking.

  NOTE: Listen carefully to caller's voice to pick up any distinguishing characteristics which might identify individual. Also listen for any noises in the background which could identify location where hostage is being held.

- Write down caller's demands. Ask questions to determine why hostage is being held and how much money is needed.

- Cooperate with caller.

- Stall for time. Explain that it is difficult to obtain large sums of money in a short period of time.

- Attempt to arrange a hostage exchange for ransom. Make sure instructions are clear.

    - When
    - Where
    - Amount of ransom
    - Type of payoff—person-to-person or drop

  NOTE: It is always preferred to make a simultaneous exchange of ransom for the hostage.

- Cooperate with law enforcement officers in securing release of hostage.

  NOTE: The safety of the hostage always comes first. The apprehension of the criminal is secondary.

Procedure to follow in the event of a demonstration.

NOTE: Any type of business needs to know about the right to protect property and legal responsibility for the safety of employees and other people. Management should obtain an opinion from the District Attorney as to rights in protecting property.

- Contact management and inform them of situation.

  NOTE: It is a management responsibility to notify security personnel or local police in the event of a demonstration.

- Locate employees at key points in facility to report on demonstrators' activities; if activities are outside, place at least two employees at entrance to relay information.

- Caution all employees to remain calm.

- Secure any items of value; minimize cash in drawers and registers.

- Remove any items which could be used as weapons.
- Proceed with business as usual.

INFORMATION SHEET

PROVIDING FOR PERSONNEL AND STORE SECURITY

III

OBJECTIVE 1

Match terms associated with personnel and store security to their correct definitions. (Supplements 1 and 2).

- **Burglary**—The breaking and entering of a facility for the purpose of committing an unlawful act such as stealing anything of value

  NOTE: For a legal definition of burglary in the first and second degree, ask your instructor for your state's laws. Oklahoma's laws regarding this are listed in Supplement 1.

- **Crime**—An act that has been committed which is against the law

- **Evacuation**—The organized withdrawal of people from a facility for safety purposes

- **Rape**—Any sexual intimacy forced upon one person by another

  NOTE: Check your state law for the court's definition of rape. It will vary from state to state.

- **Robbery**—A wrongful taking of personal property in the possession of another, from his or her person or immediate presence, and against his or her will, accomplished by means of force or fear

  NOTE: This is the definition of robbery from Oklahoma Statutes, Title 21, Section 801. Degrees of robbery are also listed in this section as follows: "Robbery, when accomplished by the use of force, or of putting the person robbed in fear of some immediate injury to his person is robbery in the first degree. When accomplished in any other manner, it is robbery in the second degree." (1987.)

- **Security**—Protection against unnecessary expense or loss in monetary or human resources; measures taken by management to guard against sabotage, theft, or attack

- **Shoplifting**—The taking of personal property by fraud or stealth with intent to deprive another thereof

  NOTE: This is the definition of larceny from Oklahoma Statutes, Title 21, Section 1701.

OBJECTIVE 2

Select from a list true statements concerning recommended opening and closing procedures for business establishments.

You are probably most vulnerable to robbery when opening or closing the store. Statistics indicate that most robberies occur at these times...the odds are in favor of the thief.

In order to keep this from happening, two people are needed to open and close a business.

Recommended opening procedures:

- Follow the carefully prescribed routine each business day.
- Employees responsible for opening should arrive at the same time. However, they should vary their arrival times each day so a potential thief won't be able to predict their time of arrival.
- Before entering, employees should drive around building and carefully check for suspicious activity or damage to facility.

  NOTE: If anything suspicious is observed upon arrival, **do not** enter the facility. Contact local law enforcement and management. Remain in view of facility, but at a safe distance, until officers arrive.
- If everything seems normal, the manager or designated employee should enter the facility using the front entrance with the other employee standing well away from the entrance.
- The first employee in should turn off the alarm and then turn on the lights and check the interior, including restrooms, offices, storerooms, and other spaces that might offer concealment for a thief.
- After a predetermined time, the employee should reappear in the front entrance and signal the waiting employee.
- The signal should be changed periodically and be given both in a voice command and gesture to indicate it is clear. Another signal should be arranged to indicate trouble.

- If the danger signal is given, the waiting employee should indicate that an item was left in the car and then proceed slowly but deliberately to a phone to call the police.

  NOTE: The location of the nearest phone should be established as a part of employee training. Also, a small business card listing the phone number of local police and a quarter taped on the opposite side of the card should be carried by employees. It may save an employee's life in the event of emergency.

- If the clear signal is given, the waiting employee should enter the facility and relock the front door until business hours.

Recommended closing procedure:

NOTE: Crimes committed after closing operations offer the greatest rewards to the criminal. With the building empty and closed, the criminal can take time to secure both money and the victim(s), thus preventing immediate contact with police. The danger in this type of situation is that criminals have no reason to hurry and acts of violence, such as rape and murder, are more likely to happen.

- Avoid closing a business alone.
- Thirty minutes before closing, check the interior including restrooms, offices, storerooms and other spaces that might offer concealment to a thief.
- Observe any unusual activity on the part of the customers as they are leaving premises.

  EXAMPLE: Loitering

- Lock all external doors immediately at closing.

  NOTE: Do not begin counting cash until entire building is secured.

- Keep closing crew in business until everyone is ready to leave together.

  NOTE: Do not allow employees to take out trash after dark or at closing. This allows robbers an opportunity to gain admittance to business.

- Complete all closing procedures and set the alarm.
- Use techniques for the prevention of burglaries.

- Leave as a group for personal safety and to deter a robber from using an employee to gain entrance to the business.

  NOTE: It is always an excellent practice for employees to park together in a well-lighted area of the parking lot.

OBJECTIVE 3

Select from a list techniques for the prevention of burglaries and robberies. (Transparency Master 1)

To prevent burglaries:

- Check all doors and windows at close of business and activate locks (internal and external) and security alarm.
- Turn on outside security lights.
- Leave interior lights on over the safe, entrance, and exit.
- Lock safe.

  NOTE: Do not leave the combination to the safe in the business. Also, do not leave the safe on "day lock"—give the dial a full turn.

- Empty register drawers and leave open.
- Keep minimum amount of money on premises.

  NOTE: Bank deposits should be made at least daily.

- Lock up extra keys, petty cash, and stamps.
- Check all rooms and storage areas for any hiding intruders.
- Report any suspicious loiterers in or near business at closing time to police.

To prevent robberies:

NOTE: Every day approximately 1500 robberies occur in the United States, mostly in retail establishments.

- Be alert during working hours.
- Keep the sales counter in clear view from outside the facility and in major traffic areas of customers.

- Openly and properly greet customers.

  NOTE: By making contact with a potential robber, you have let the individual know you are aware of his or her presence in the store.

- Look directly into customers' eyes as this may give you some indication of their intentions.

- Extend services and assistance to the customers.

  NOTE: A real customer likes the attention and robbers do not.

- Keep cash on hand to a minimum.

  NOTE: A sign alerting would-be robbers that little cash is kept on the premises is a strong deterrent to robbery.

- Keep marked money ("bait money") in cash drawer or register to help identify the robber.

- Post decals to advertise security systems.

  EXAMPLE: Minimum amounts of cash on hand.

- Be aware of activities outside the store. Increase awareness during evening hours of operation.

- Be aware of blind areas around store where a person or vehicle could be hiding.

- Take note of possible escape routes that might be available to a fleeing person.

- Always call for a police patrol check if activities around store appear suspicious.

- Assist police and courts in prosecuting robbers who are caught as a deterrent to other robbers.

OBJECTIVE 4

Name ways to prevent violence during a robbery.
(Transparency Master 2)

- Keep it short and smooth.

  NOTE: The longer the robbery takes, the more nervous the robber becomes.

- Remain calm.

- Listen carefully to orders and carry them out precisely, without hesitation.

- Do not argue with the robber.

  NOTE: Robbers seldom hurt people who cooperate with them.

- Tell the robber about any possible surprises.

  EXAMPLE: New shift coming on duty or an expected delivery.

- Do not make any statement to the robber that could be misinterpreted as a threat.

  EXAMPLE: Telling a robber he or she will be prosecuted to the fullest extent of the law.

- Do not fight the robber.

  NOTE: Money is not worth the risk of harm to customers or employees.

- Do not use weapons.

  NOTE: It is company policy which determines whether weapons are prohibited from the premises.

- Drop and lie perfectly still if shooting starts.

- Do not chase or follow robbers. A robber may deal with threats violently.

  NOTE: A police officer could mistake you for the robber if you were observed fleeing the scene. Try to note the direction the robber goes and the mode of transportation used.

OBJECTIVE 5 **Select from a list true statements concerning the correct procedure for reporting a robbery.**

- When robber has left the store, call the police. Respond to all questions and do not hang up the phone until the officer tells you to do so.

  NOTE: Emergency phone numbers should be located on or near the telephone.

- In the event a person is injured, call the paramedics and then contact the injured person's family.

- Follow up the emergency call with a call to your supervisor.

- Stay near the phone.

- Protect the crime area from any disturbance. **Do not touch any evidence.**

  NOTE: All business transactions must stop until the police have completed their investigation.

- Lock door after robbery and halt all business until police arrive; do not disturb evidence.

  NOTE: If the robbers get back in, they may create a hostage situation.

- Take out a robbery description sheet and fill in the appropriate information while it is fresh in your mind.

- If other witnesses to robbery are present, ask them to write down robber's description and to remain until police arrive.

  NOTE: Do not discuss robbery with others or allow them to discuss robbery with one another. Leave fact-finding to the police.

- Do not estimate amount of loss.

  NOTE: If you are not certain of the exact amount, tell the police a correct amount can be determined by your supervisor.

- Do not discuss the amount taken with the news media.

OBJECTIVE 6

Select from a list types of information included on a crime fact sheet. (Transparency Master 3)

Physical description

- Height
- Weight
- Age
- Color of hair, eyes, complexion
- Distinguishing characteristics

Clothing

- Style
- Color
- Type

Miscellaneous

- Weapon exhibited
- Speech
- Any names used
- Mannerisms

Means of escape

- Mode of transportation
- Direction taken

OBJECTIVE 7

Match the common methods of internal theft with the appropriate counter measures to prevent or reduce internal theft.

Method—Loosely controlled markdown procedures.

Preventive Action—Price items be machine, not by handwriting. Permit only authorized employees to take markdowns and mark items.

Method —Refunds provide dishonest employees an easy means to steal from a business.

Preventive Action—Insist on a merchandise inspection by someone other than the person who made the refund, match items to refund vouchers, and return the merchandise to stock as quickly as possible. Keep tight control on credit documents. Counter sign refunds in presence of the customer.

Method—The popular employee is a great asset, provided he or she is popular for the right reasons. However, many salespeople win "fans" because of the "deals" and "favors" they grant.

Preventive Action—The popular employee may be your biggest asset. But don't take it for granted. Find out for yourself why they are so popular. Pay special attention to the employee who is visited by too many friends. One way to deter this type of violation is to emphasize during orientation that they work in a one-price company and no one is entitled to a "price-cutting" deal.

Method—The register operator's job is particularly vulnerable to theft. An experienced cashier with larceny in mind can rob an organization in hundreds of ways.

Preventive Action—Keep a sharp eye open for signals, nods, etc. between cashiers and customers. Pay special attention to cashiers when they are surrounded by clusters of people. Be alert to the use of overring slips to cover shortages. Watch for items bypassed when sales are being rung up. Check register area for personal "bookkeeping" notations. Balance cash drawers frequently, unannounced, at random times.

Method—Large scale theft is carried on more often through the back door. Thousands of dollars worth of merchandise have been stolen out of back doors.

Preventive Action—Have secondary check by another employee on all incoming shipments. Insist on flattening all trash cartons and make spot checks of trash after hours. Keep receiving door locked when not in use. The back door should be opened only by a supervisory person.

Method—Manipulation of paperwork or making false entries to cover theft of either money or merchandise.

Preventive Action—Periodic review and verification spot checks of the various internal controls and paperwork. Plant some deliberate errors to check employee.

Method—Outright theft of either money or merchandise.

EXAMPLE: Wearing items out of the store; eating company food items; hiding stolen merchandise in a legitimate employee purchase; placing merchandise in bags, briefcases, lunch boxes, etc.

Preventive Active—Take note of employees who never make employee purchases. Do not allow temporary employees to work in areas with valuable merchandise or money. Check references of all prospective employees. Seal and record all employee purchases. Follow up on any money irregularities immediately and thoroughly.

Method—Chronic thief.

Preventive Action—Most people are basically honest. Remove the temptation to steal and there is every chance that they will remain honest. But unfortunately, managers must also protect themselves against the minority who are basically dishonest - hard-core thieves. The only way to stop them is to uncover their methods of operation and put an end to both it and their employment. If you feel you need help in this area, talk to your supervisor or seek the help of professional security personnel.

In summary, the key to preventing internal theft is the proper supervision of employees, regardless of relationships. Whatever the controls, whether physical or procedural, reduce the opportunity for employee theft. Limit opportunity and reduce the potential for theft.

OBJECTIVE 8

List behaviors typical of shoplifters.

Customer surveillance

NOTE: The following behaviors *may* indicate a person who intends to shoplift.

Watch for—

- A person who leaves a particular area very quickly.
- A person who makes several trips to restrooms.
- A person carrying a large box or bag, topcoat, briefcase, newspaper, or umbrella, or with an arm in a sling.
- A person wearing heavy outer garments when the weather is not cold.
- A person with an unusual walk, who tugs at sleeves, adjusts socks, or wears baggy clothes.
- A person who reaches into display areas.
- A person who always keeps one hand in a pocket.
- A person who seems very nervous or flushed.
- A person who comes in and out several times during the day but never wants any help nor buys anything.

OBJECTIVE 9

List guidelines for preventing shoplifting.

Store precautions

- Serve customers when they enter.
- Keep counters and shelves neat and orderly so missing items are easily spotted.
- Look inside large items such as cans, luggage, purses, and boxes at checkout.
- Be sure there is a warning system among employees.
- Keep all areas of store attended.
- Be sure your employer trains you in handling shoplifters.

- Arrange displays so they do not provide cover for shoplifting.
- Structure aisles so that they do not hide other areas of the store.
- Place small, expensive items in glass cases.
- Place expensive items in locked cases or use tags with alarms on them.
- In larger stores; use cameras, mirrors, peek holes, uniformed guards, bag-check stations, and controlled exits.
- Control dressing room if your store has one.

  NOTE: Limit number of garments taken in and out, monitor entrance, and check on customers regularly.
- Always prosecute shoplifters if you are a store manager; post signs stating this fact in the store.

OBJECTIVE 10 **List guidelines for approaching a suspected shoplifter.**

- Notify store owner or manager, if possible, and have him or her stop the suspect.

  NOTE: Be sure you actually saw something taken and know where it is concealed, where it came from, how it was taken, and whether the suspect still has the merchandise.
- Always have another person present when you question someone about suspected shoplifting.
- Never touch the suspected person; try to have someone of the same sex as the shoplifter with you as you approach him or her.
- Try to keep the encounter inconspicuous. Inform the suspect who you are and what you want. Say something like, "I believe you have some merchandise on your person or in your bag which you have forgotten to pay for. Would you come back to the store to straighten out this matter?"
- Escort the suspect to the office as quickly as possible.
- Apprehend shoplifters outside the store. For one thing, this strengthens the store's case against a shoplifter.

- Never mention the word "steal" or "thief" to the suspect, and do not threaten.
- Remain calm and polite, even if the person creates a disturbance.
- Do not use force to detain any person.
- Approach anyone suspected of using drugs very carefully; the suspect could be, or become, violent.
- Never try to search a suspect; allow the police to do that. You can ask the suspect for the merchandise, and if he or she gives it willingly, you may ask the suspect to sign a confession.
- Never make deals with shoplifters or allow the suspect to pay for the merchandise after he or she has been caught.
- Always call the police.
- Release suspect immediately with apologies and a brief explanation of your actions if your investigation reveals that the suspect is probably not a shoplifter.
- Prepare a note containing all the details of what happened in connection with the incident.

NOTE: Be sure to discuss these guidelines with your employer and ask how he or she prefers to handle shoplifting incidents.

DEGREES OF BURGLARY AND THEIR PENALTIES

(Oklahoma Statutes, Title 21, Section 1431.)

21-1431.

1431. Burglary in first degree

Every person who breaks into and enters the dwelling house of another, in which there is at the time some human being, with intent to commit some crime therein, either:

1. By forcibly bursting or breaking the wall, or an outer door, window, or shutter of a window of such house or the lock or bolts of such door, or the fastening of such window or shutter; or
2. By breaking in any other manner, being armed with a dangerous weapon or being assisted or aided by one or more confederates then actually present; or
3. By unlocking an outer door by means of false keys or by picking the lock thereof, or by lifting a latch or opening, is guilty of burglary in the first degree. (1979)

21-1431 BURGLARY IN FIRST DEGREE.

1432 to 1434. Repealed by laws 1941, p. 87, 2.

1435. Burglary in second degree—Acts constituting

Every person who breaks and enters any building or any part of any building, room, tents, railroad car, automobile, truck, trailer, vessel or other structure or erection, in which any property is kept, or breaks into or forcibly opens, any coin-operated or vending machine or device with intent to steal any property therein or to commit any felony, is guilty of burglary in the second degree. (1961)

21-1435. BURGLARY IN THE SECOND DEGREE.

1436. Punishment of burglary

Burglary is punishable by imprisonment in the penitentiary as follow:

1. Burglary in the first degree for any term not less than seven (7) years nor more than twenty (20) years.
2. Burglary in the second degree not exceeding seven (7) years and not less than two (2) years. (1887)

The laws pertaining to shoplifting are found in the state statutes and city ordinances.

A. Laws of State of Oklahoma

Title 21, Chapter 68, Oklahoma Statutes 1701 et. seq.

In Oklahoma, the crime of stealing personal property is termed a *larceny*. The elements of a larceny are:

1.. A taking
2. of personal property
3. by fraud or stealth
4. with intent to deprive another thereof

Larcenies are divided into two degrees: Grand Larceny and Petit Larceny.

1. Grand Larceny: Grand Larceny is committed when the personal property taken is worth more than fifty dollars ($50.00). This is considered a Felony offense.
    a. Punishment for Grand Larceny: If a person is convicted of grand larceny, the punishment is confinement in the state penitentiary for a period of one to five years.
2. Petit Larceny: Petit Larceny is any act of larceny which involves taking of property valued under fifty dollars ($50.00). This is considered a misdemeanor offense.
    a. Punishment for Petit Larceny: The punishment for being convicted of petit larceny varies with the number of items taken and the number of previous larceny convictions.
        1. First Conviction/One Item Stolen: If it is the first conviction, a person can be sentenced to serve no more than thirty (30) days in the county jail and pay a fine which can range from ten dollars ($10.00) to one hundred dollars ($100.00).

2. First Conviction/Multiple Items Stolen: If it is a first conviction but more than one item was taken, a person can be sentenced to serve no more than thirty (30) days in the county jail and pay a fine which can range from fifty dollars ($50.00) to one hundred dollars ($100.00).

3. Second Conviction: If it is a person's second conviction for petit larceny, he or she will serve a sentence in the county jail for a period which can range from thirty (30) days to one (1) year and pay a fine of up to one thousand dollars ($1,000.00).

4. More Than Two Convictions: If a person has two or more previous petit larceny convictions and is convicted again, he or she will be sentenced to confinement in the state penitentiary for a period which can range from two (2) to five (5) years.

B. Detentions

Title 22, Chapter 25, Oklahoma Statutes 1343

The purpose of the detention statute is to give merchants and their employees a guideline to what they can do in the event a suspected shoplifter is detected.

If there are reasonable grounds or probable cause to believe a person has committed or is committing a wrongful taking of personal property, any merchant, their agents, or employees may detain an individual in a reasonable manner for a reasonable length of time in order to:

a. Conduct an investigation of whether a wrongful taking of personal property has taken place (this includes a reasonable interrogation)

b. Call police

c. Perform a reasonable search of detainee and his or her belongings

d. Recover personal property believed to be taken wrongfully

1. Reasonable Grounds and Probable Cause:

   Under the statute, merely suspecting a person of shoplifting is not enough to justify detention. The standard used to determine if a detention can be made is "Are there reasonable grounds to warrant a cautious person to believe the suspect is guilty of shoplifting?" The two things to look for are:

   a. Has the suspect exercised control over the property, and

   b. Does the suspect have the intent to permanently deprive the owner of the property unlawfully?

   If an individual is seen concealing the item in some way (putting goods in pocket, inside a coat, under a dress, etc.) then the first element is satisfied. The second element is satisfied by the individual attempting to leave the premises with the goods without paying for them. Criminal charges cannot be filed until the person goes through the checkout without paying for the merchandise.

2. Reasonable Time and Manner:

   This is a very broad definition. The "reasonableness" will be determined by the circumstances of each case. Obviously, no suspect can be detained for several hours, but time enough to recover the goods and to call the police so arrest may be made is regarded as reasonable. It is best to adopt a detailed store policy to handle this situation so that when detention occurs, the merchant or employees may decide on the course of action to be followed without delay.

3. Where Detention Should Be:

   Although initial stops of a suspect will usually take place outside of the store or near the checkout counter, all questioning and conversing should be carried out in a place which is as private as possible. Exposure to the peering eyes and curious ears of other customers should be kept to a bare minimum.

4. Searches:

The U.S. Constitution protects individuals from unlawful search and seizure. 22 O.S. 1343 gives merchants, their agents or employees the ability to conduct "a reasonable search of the detained person and his belongings," if there are "reasonable grounds" to believe the individual has the merchandise on his or her person or within his or her belongings. If there is a question as to whether or not to search a suspect to regain the lost property, the best course of action would be to wait for the police to arrive to determine whether a search should be made.

Prepared by Officer Bert Franks, Stillwater, Oklahoma, Police Department.

Factors in Robbery

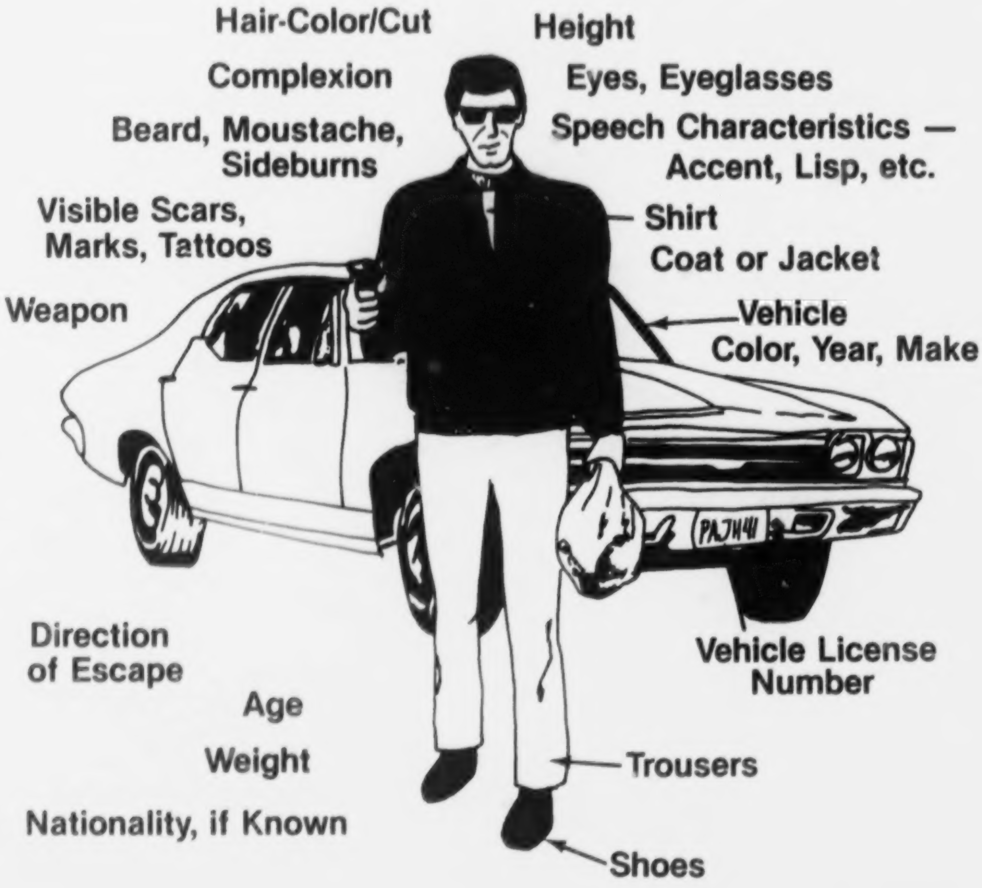
	(On a scale of 1 to 5 with 1 most important)	
1)	Amount of money	1.27
2)	Escape route	2.33
3)	Anonymity	2.76
4)	Likelihood of interference	3.02
5)	Active police patrol	3.44
6)	Armed clerk	3.60
7)	Number of clerks in store	3.76
8)	Number of customers in store	3.80
9)	Camera system in store	4.18
10)	Alarm system in store	4.39

Facts About Rape

- Rape is a crime of violence, not sex.
- Statistics indicate you are more likely to be attacked by someone you know casually than by a total stranger.
- Rapists have no outstanding physical characteristics. They look like everybody else.
- Rape is often planned. It is not an impulsive act.
- There is no specific place or time for rapes to occur.
- August is the month during which rapes occur most frequently and January is the month in which the least number of rapes occur.
- The victim is **not** the guilty party.

Thanks for the Memory

Most Robberies are Over in Less Than One Minute. Take Note of Everything You Can...the Robber's Size, Weight, Build, Dress, Speech, Abnormalities, Method and Direction of Getaway.


Hair-Color/Cut
Height
Complexion
Eyes, Eyeglasses
Beard, Moustache, Sideburns
Speech Characteristics — Accent, Lisp, etc.
Visible Scars, Marks, Tattoos
Shirt
Coat or Jacket
Weapon
Vehicle Color, Year, Make
PAJ441
Direction of Escape
Vehicle License Number
Age
Weight
Trousers
Nationality, if Known
Shoes

Don't Compare Notes With Other Witnesses. It's Easy to Become Confused.

ASSIGNMENT SHEET 1

PROVIDING FOR PERSONNEL AND STORE SECURITY

III

NAME ______________________________ SCORE ________

OBJECTIVE 11

Complete a crime fact sheet.

INTRODUCTION

There are several factors which can lead to the quick apprehension of a criminal. A good physical description is the primary factor. However, it is also important to note clothing worn, the type of weapon used, unusual speech pattern or mannerisms, and the means and direction of escape.

DIRECTIONS

A robbery will be staged in the classroom as part of this assignment. Based on the given situation, complete the fact sheet below. Remember, it is important to give correct information. If you are unsure, it is better to leave a blank space on the sheet.

Part I: Physical Description

Color ____________ Sex ________ Nationality ______________

Age ______________ Height _____ Weight _________________

Build (thin, stocky, etc.) ______________________________

Complexion (light, dark, ruddy, etc.) ____________________

Hair (color) ____

Eyes (color) ____

Nose (large, small, broad, pug, etc.) ____________________

Ears (prominent, small, etc.) ___________________________

Glasses (describe frames) ______________________________

Mustache or Beard (color, shape, etc.) __________________

Mask or Falseface (type, color, etc.) ___________________

Scars or Marks (tatoos, birthmarks, facial blemishes, etc.)

____

Distinguishing Characteristics (how would you pick this person out of a crowd?) ______________________

____

____

Part II

(Describe color, type of material, style, etc.)

Hat ______________________

Overcoat ______________________

Raincoat ______________________

Jacket ______________________

Suit ______________________

Trousers ______________________

Shirt ______________________

Tie ______________________

Shoes ______________________

Other Clothing ______________________

Part III: Miscellaneous

Weapon Exhibited ______________________

(revolver, automatic pistol, knife, etc.) ______________________

Speech (any accent, peculiarity of speech) ______________________

Any Names Used ______________________

____

Mannerisms (right or left handed, unusual) ______________________

____

(walk or carriage, nervous habit, etc.) ______________________

____

Part IV: Additional Data

Means of Escape (on foot, auto) ______________________

Direction Taken ______________________

____

Motor Vehicle

License No. (lic. no., state, color) ______________________

Other ______________________

____

Make (black, two-tone, ivory over blue, etc.) ______________________

____

Color ______________________

Year ____________ Model (2 door, convertible, etc.) ____________

____

Number, Color and Sex of Passengers ______________________

____

Special Features ______________________

____

Remarks ______________________

____

____

____

____

Prepared by ______________________

Position or Address ______________________

Date and Time of Incident ______________________________

214

PROVIDING FOR PERSONNEL AND STORE SECURITY

NAME ______________________________ SCORE ______

OBJECTIVE 12 **Analyze case studies to determine correct security practices.**

INTRODUCTION As an employee, you must constantly be aware of threats to your safety and to the safety of others. Each business runs the risks of burglary, robbery, and other security threats both to the business and personnel. This assignment sheet will give you practice in recognizing and dealing with such situations. Appropriate actions in such situations may save money and lives.

DIRECTIONS Read the following case studies and answer the questions following each one.

A. Joan and Jim work the early morning shift at the local agri-super store. Every morning they open the store at 6:30 a.m. to prepare for business. One early spring morning, Joan arrives at 5:30 a.m. so that she can take off early to go on a date. Usually Joan waits for Jim to arrive before unlocking the store, but today she decides to just open the front door and go in. After all, if anyone wants money, they will be in by the cash register. After a quick glance through the window, Joan goes in and turns on the lights and cash register. After a few minutes of straightening merchandise, she goes to the back room to get more change for the cash register.

Just as she goes through the door and reaches for the business office lights, a man grabs her from behind and pulls her to the floor. She is no match for her assailant, and she is beaten and raped. When Jim arrives at the store, he finds Joan crying. He asks what happened. As he goes to the business office, he sees that the assailant had entered through the back door of the store, which apparently was not locked the night before. Jim checks the store register and finds last night's earnings also taken, since the assistant manager had neglected to deposit the money or put it in the safe.

1. What is the first thing that could have prevented this situation?

____

____

2. What did Joan do wrong in opening the business?

____

____

____

3. What could be done to prevent this situation from happening again?

____

____

____

B. John works nights and weekends at the local farm supply store. He usually rotates between several departments—lawn and garden, hardware, or feed and seed. Tonight, he is working both hardware and lawn and garden. It is a slow night, so John begins closing out the back register. After all, he'd already told his friends he would meet them at the late movie. The only customers in his area of the store (three young men) have been looking around for some time and don't appear to be interested in buying anything anyway. One of them has already left.

As John finishes counting the money in his register and cuts through the storeroom to put the money in the main office, he notices a movement behind some boxes. The man he thought had left comes from behind the boxes and asks for the money. As Jim turns to run, he sees the other two men behind him, one of them holding a shovel as if to hit him in the head.

"Look, there's not much money here, and I'm not going to let you bums have it! You probably just want it for drugs! Get out that back door now, and I won't report you. My boss will be here any minute to put the rest of the money..." Before John could finish his sentence, he is hit over the head with the shovel. As he falls to the floor, the men grab the money and leave through the back door. Fifteen minutes later, the store manager discovers John lying on the cement floor and the back door of the store open.

1. List factors that contributed to the robbery.

____

____

____

2. What could be done to prevent this from happening again?

____

____

____

C. Kay is a cashier in the women's clothing and accessories area of a large western store. This Saturday morning is a particularly frustrating day, Kay thinks to herself, since she needs to finish deciding what to wear to the rodeo and dance that night. She decides to make a list of everything she will wear to the rodeo and dance. She will clean up that messy jewelry counter later. No one is around needing to be waited on, she thinks to herself, except those two teenage girls who have been looking at everything and don't seem to want any help.

As Kay starts her list, her best friend Sharon drops by to discuss the evening's plans. As they compare notes, Kay notices one of the teenagers going into the dressing room with several items over her arm. Her friend nervously waits for her with her hands in her pockets. Soon, she begins looking at the purses. Kay and Sharon continue talking, and the girl nervously approaches the register to pay for a large purse. Kay hurriedly rings up the purse without checking inside it, so she can finish her conversation. The girl pays for the purse and leaves quickly, without her friend.

Later, as Kay checks in the dressing room before leaving for lunch, she discovers clothes left in one room, but not clothes from the store. Upon closer inspection, she remembers the shirt and jeans match what the other teenage girl was wearing. As she picks them up, she finds two small boxes underneath, one of which had contained a silver belt buckle and one which had contained a moderately expensive turquoise and silver necklace and matching earrings. As Kay goes out to inspect the jewelry counter, she sees that the pin she had been waiting to buy is also missing.

1. List factors that contributed to the shoplifting of merchandise from the store.

____

____

____

2. What could be done to prevent this from happening again?

____

____

____

218

ASSIGNMENT SHEET 1

Actual information will vary depending on type of robbery staged in classroom. The following are suggested criteria to be included.

Physical description

- Height
- Weight
- Age
- Color of hair, eyes, complexion
- Distinguishing characteristics

Clothing

- Style
- Color
- Type

Miscellaneous

- Weapon exhibited
- Speech
- Any names used
- Mannerisms

Means of escape

- Mode of transportation
- Direction taken

ASSIGNMENT SHEET 2

A. 1. —The back door should have been locked.

2. — She should have driven around the building and looked for suspicious activity.

- She should not have gone to work early to open the store alone.
- She should have looked in the front window carefully and then turned on all lights in the building and inspected the interior of the building.

3. — Make sure all doors and windows are securely locked.

- Lights inside the store should be left on at night to deter crime.
- Money from the cash register should be deposited nightly or at least locked in a store safe.
- Employees should follow all opening and closing procedures as listed in this unit.

B. 1. — The back door of the store was unlocked.

- The store was understaffed.
- John was not watching the customers carefully (he did not see them leave or take the shovel)
- He began closing out the cash register before the store closed.
- Also, John should not have argued with and threatened the robbers.

2. — Make sure that customers are watched carefully and do not begin closing the store until doors are locked and building has been inspected.

- Be sure back door to building is locked at all times except during business use.
- Follow guidelines listed in Information Sheet, Objective 4 for preventing violence during a robbery; and Objective 3, techniques for prevention of burglaries and robberies.

C. 1. — Customers were not watched or greeted;

- Kay was not alert to what they were doing.
- She did not check inside purse for concealed merchandise nor did she monitor the dressing room.
- Counters were not kept neat and orderly to detect missing merchandise.

220

2. — Correct mistakes made as listed in answer 1 above, and follow all guidelines to prevent shoplifting as listed in Information Sheet, Objective 8.

WRITTEN TEST

PROVIDING FOR PERSONNEL AND STORE SECURITY

III

NAME ______________________ SCORE ________

OBJECTIVE 1

Match terms associated with personnel and store security to their correct definitions. Write the correct letters in the blanks.

____ 1. A wrongful taking of personal property in the possession of another, from his or her person or immediate presence, and against his or her will, accomplished by means of force or fear

____ 2. The breaking and entering of a facility for the purpose of committing an unlawful act such as stealing anything of value

____ 3. The taking of personal property by fraud or stealth with intent to deprive another thereof

____ 4. An act that has been committed which is against the law

____ 5. Protection against unnecessary expense or loss in monetary or human resources; measures taken by management to guard against sabotage, theft, or attack

____ 6. Any sexual intimacy forced upon one person by another

____ 7. The organized withdrawal of people from a facility for safety purposes

a. Security
b. Shoplifting
c. Crime
d. Pilferage
e. Burglary
f. Rape
g. Robbery
h. Soundness
i. Evacuation
j. Misdemeanor

OBJECTIVE 2

Select from a list true statements concerning recommended opening and closing procedures for business establishments. Write an "X" in the blank before each true statement.

Recommended opening procedure

____ 1. Before entering, employees should drive around building and carefully check for suspicious activity or damage to facility.

____ 2. If everything seems normal, the manager or designated employee should enter the facility using the back entrance with the other employee standing well away from the entrance.

____ 3. Follow the carefully prescribed routine each business day.

____ 4. If the danger signal is given, the waiting employee should indicate that an item was left in the car and then proceed slowly but deliberately to a phone to call the newspaper.

____ 5. If the clear signal is given, the waiting employee should enter the facility and relock the front door until business hours.

____ 6. Employees responsible for opening should arrive in fifteen-minute intervals.

____ 7. The first employee in should turn off the alarm and then turn on the lights and check the interior, including restrooms, offices, store-rooms, and other spaces that might offer concealment for a thief.

____ 8. After the employee feels it is safe, the employee should reappear in the front entrance and signal the waiting employee.

____ 9. The signal should not be changed periodically.

Recommended closing procedure

___ 10. Observe any unusual activity on the part of the customers as they are leaving premises.

___ 11. Lock all cabinets immediately at closing.

___ 12. Avoid closing a business in groups.

___ 13. Leave as a group for personal safety and to deter a robber from using an employee to gain entrance to the business.

___ 14. Keep closing crew in business until everyone is ready to leave together.

___ 15. Complete all closing procedures and set the alarm.

___ 16 Allow employees to leave as soon as their areas are secure.

___ 17. Thirty minutes before closing, check the interior including restrooms, offices, storerooms and other spaces that might offer concealment to a thief.

OBJECTIVE 3

Select from list techniques for the prevention of burglaries and robberies. Write an "X" in the blank before each correct answer.

To prevent burglaries

____ 1. Close register drawers.

____ 2. Keep maximum amount of money on premises.

____ 3. Turn on outside security lights.

____ 4. Leave interior lights on over the safe, entrance, and exit.

____ 5. Do not lock safe in case of robbery.

____ 6. Check all doors and windows at close of business and activate locks (internal and external) and security alarm.

____ 7. Check all rooms and storage areas for any hiding intruders.

____ 8. Report any suspicious loiterers in or near business at closing time to supervisor.

____ 9. Lock up extra keys, petty cash, and stamps.

To prevent robberies

___ 10. Do not allow suspicious persons know they are being watched.

___ 11. Do not greet customers who appear suspicious.

___ 12. Look directly past customers as this may give you some indication of their intentions.

___ 13. Post decals to advertise security systems.

___ 14. Be aware of blind areas around store where a person or vehicle could be hiding.

___ 15. Always call to file a police report if activities around the store appear suspicious.

___ 16. Assist police and courts in prosecuting robbers who are caught as a deterrent to other robbers.

___ 17. Take note of possible escape routes that might be available to a fleeing person.

___ 18. Keep the back of the store in clear view from outside the facility and in major traffic areas of customers.

___ 19. Keep cash on hand to a minimum.

___ 20. Activities outside the store are not important so do not have to be monitored closely.

___ 21. Keep marked money ("bait money") in cash drawer or register to help identify the robber.

___ 22. Extend services and assistance to the customers.

OBJECTIVE 4

Name ways to prevent violence during a robbery. Write five ways in the space provided.

____

____

____

____

____

OBJECTIVE 5

Select from a list true statements concerning the correct procedure for reporting a robbery. Write an "X" in the blank before each true statement.

____ 1. Take out robbery description sheet and fill in the appropriate information after you have had time to think about it.

____ 2. Lock door after robbery and halt all business until police arrive; do not disturb evidence.

____ 3. If other witnesses to robbery are present, ask them to write down robber's description and to remain until police arrive.

____ 4. In the event a person is injured, call the police and then contact the injured person's supervisor.

____ 5. Follow up the emergency calls with a call to the doctor.

____ 6. When robber has left the store, call the police. Respond to all questions and do not hang up the phone until the officer tells you to do so.

____ 7. Stay near the phone.

____ 8. Protect the crime area from any disturbances. Arrange the evidence.

____ 9. Do not estimate amount of the loss.

___ 10. Do not discuss the amount taken with the news media.

OBJECTIVE 6

Select from a list types of information included on a crime fact sheet. Write an "X" in the blank before each correct answer.

____ 1. Height

____ 2. Amount of money taken

____ 3. Weight

____ 4. Date of birth

____ 5. Weapon exhibited

____ 6. Destination of escape

____ 7. Color of hair, eyes, complexion

____ 8. Clothing style, color, type

____ 9. Legal name

____ 10. Mode of transportation used and direction taken in escape

____ 11. Speech

____ 12. Mannerisms

____ 13. Driver's license number

____ 14. Motive

____ 15. Length of time of crime

OBJECTIVE 7 | **Match the common methods of internal theft with the appropriate counter measures to prevent or reduce internal theft.** Write the correct letters in the blanks.

Methods

____ 1. Loosely controlled markdown procedures

____ 2. Refunds provide dishonest employees with a way to carry out thefts

____ 3. The "popular" employee who is winning fans because of deals and favors granted

____ 4. An experienced cashier with larceny in mind

____ 5. Theft out the back door

____ 6. Manipulation of paperwork or making false entries to cover thefts

____ 7. Wearing merchandise out of the store, eating company food items; placing merchandise in briefcases, lunch boxes, bags; hiding items in legitimate employee purchases

____ 8. Hard-core thief

Preventive Actions

a. Periodically review and spot check the various internal controls and paperwork.

b. Have secondary check by another employee of all incoming shipments. Flatten all trash cartons. Make spot checks of trash after hours. Keep receiving door locked when not in use. Permit only supervisory personnel to open back doors.

c. Price items by machine. Permit only authorized employees to take markdowns and mark items.

d. Find out why an employee is so popular. Pay special attention to who is visiting the employee. Include in your orientation that your company has only "one price" and no one is entitled to "cut prices" without management approval.

e. Take note of employees who never make employee purchases. Do not allow temporary employees to work with money. Check references of all prospective employees. Follow up on any money irregularity.

f. Remove the temptation to steal. Uncover the thief's methods of operation and put an end to both their methods and employment. Seek professional security help with the difficult cases.

g. Insist on a merchandise inspection by someone other than the person who made refund and match items to refund vouchers. Keep tight control on credit documents.

h. Keep a sharp eye open to signals. Watch for items bypassed when sales are being rung up. Check register area for "bookkeeping" notation. Balance cash drawers frequently.

OBJECTIVE 8 **List behaviors typical of shoplifters.** Write five behaviors to watch for in the space provided.

OBJECTIVE 9 **List guidelines for preventing shoplifting.** Write five guidelines in the space provided.

OBJECTIVE 10 **List guidelines for approaching a suspected shoplifter.** Write six guidelines in the space provided.

NOTICE The following assignment sheets are not a part of the written test. If these activities have not been completed, check with your instructor.

OBJECTIVE 11 **Complete a crime fact sheet.** SCORE ______

OBJECTIVE 12 **Analyze case studies to determine correct security practices.** SCORE ______

OBJECTIVE 1

1. g
2. e
3. b
4. c
5. a
6. f
7. i

OBJECTIVE 2

1, 3, 5, 7, 10, 13, 14, 15, 17

OBJECTIVE 3

3, 4, 6, 7, 9, 13, 14, 17, 19, 21, 22

OBJECTIVE 4

Answer should include any five of the following:

- Keep it short and smooth.
- Remain calm.
- Listen carefully to orders and carry them out precisely, without hesitation.
- Do not argue with the robber.
- Tell the robber about any possible surprises.
- Do not make any statement to the robber that could be misinterpreted as a threat.
- Do not fight the robber.
- Do not use weapons.
- Drop and lie perfectly still if shooting starts.
- Do not chase or follow robbers. A robber may deal with threats violently.

OBJECTIVE 5

2, 3, 6, 7, 9, 10

OBJECTIVE 6

1, 3, 5, 7, 8, 10, 11, 12

OBJECTIVE 7

1. c
2. g
3. d
4. h
5. b
6. a
7. e
8. f

OBJECTIVE 8

Answer should include any five of the following:

- A person who leaves a particular area very quickly.
- A person who makes several trips to restrooms.
- A person carrying a large box or bag, topcoat, briefcase, newspaper, or umbrella, or with an arm in a sling.
- A person wearing heavy outer garments when the weather is not cold.
- A person with an unusual walk, who tugs at sleeves, adjusts socks, or wear baggy clothes.
- A person who reaches into display areas.
- A person who always keeps one hand in a pocket.
- A person who seems very nervous or flushed.
- A person who comes in and out several times during the day but never wants any help nor buys anything.

OBJECTIVE 9

Answer should include any five of the following:

- Serve customers when they enter.
- Keep counters and shelves neat and orderly so missing items are easily spotted.
- Look inside large items such as cans, luggage, purses, and boxes at checkout.

- Be sure there is a warning system among employees.
- Keep all areas of store attended.
- Be sure your employer trains you in handling shoplifters.
- Arrange displays so they do not provide cover for shoplifting.
- Structure aisles so that they do not hide other areas of the store.
- Place small, expensive items in glass cases.
- Place expensive items in locked cases or use tags with alarms on them.
- Use cameras, mirrors, peek holes, uniformed guards, bag-check stations, and controlled exits in larger stores.
- Control dressing room if your store has one.
- Always prosecute shoplifters if you are a store manager; post signs stating this fact in the store.

OBJECTIVE 10

Answer should include any six of the following:

- Notify store owner or manager, if possible, and have him or her stop the suspect.
- Always have another person present when you question someone about suspected shoplifting.
- Never touch the suspected person; try to have someone of the same sex as the shoplifter with you as you approach him or her.
- Try to keep the encounter inconspicuous. Inform the suspect who you are and what you want. Say something like, "I believe you have some merchandise on your person or in your bag which you have forgotten to pay for. Would you come back to the store to straighten out this matter?"
- Escort the suspect to the office as quickly as possible.
- Apprehend shoplifters outside the store. For one thing, this strengthens the store's case against the shoplifter.

- Never mention the word "steal" or "thief" to the suspect, and do not threaten.
- Remain calm and polite, even if the person creates a disturbance.
- Do not use force to detain any person.
- Approach anyone suspected of using drugs very carefully; the suspect could be, or become, violent.
- Never try to search a suspect; allow the police to do that. You can ask the suspect for the merchandise, and if she or he gives it willingly, you may ask the suspect to sign a confession.
- Never make deals with shoplifters or allow the suspect to pay for the merchandise after she or he has been caught.
- Always call the police.
- Release the suspect immediately with your apologies and a brief explanation of your actions if the investigation reveals that the suspect is probably not a shoplifter.
- Prepare a note containing all the details of what happened in connection with the incident.

OBJECTIVES 11 - 12 Refer to answers to Assignment Sheets 1 and 2.

OBJECTIVE SHEET

USING EFFECTIVE COMMUNICATION SKILLS

IV

INTRODUCTION

"I know that you think that you understand what you thought you heard me say, but I'm afraid that what you do not realize is that I did not say what I really meant." (Author unknown).

This statement illustrates how difficult it can be to communicate effectively, both for the speaker and the listener. Communication (both verbal and nonverbal) is an important part of everyday life. Your ability to communicate effectively influences how others perceive you. It is an important part of both personal and career success.

UNIT OBJECTIVE

After completing this unit, the student should be able to discuss causes of communication problems, identify positive and negative nonverbal communication, practice effective listening skills, introduce self and others and acknowledge introductions properly. The student should also be able to give and follow directions, use the telephone correctly, take a telephone message, and write a business memorandum. The student will demonstrate these competencies by completing the assignment sheets and written test with a minimum of 85 percent accuracy.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to

1. Match terms associated with basic communication skills to their correct definitions.
2. List the purposes of communication.
3. Name the basic styles of communication.
4. Select from a list causes of communication problems.
5. Select from a list ways to generally improve communication.
6. Distinguish between positive and negative nonverbal signs of communication.
7. Complete statements about ways to listen more effectively.
8. Discuss how to introduce oneself to others.
9. List guidelines for introducing others.
10. List guidelines for acknowledging introductions.

11. Select from a list types of information needed to clarify store policies.

12. Describe how to give directions properly in a work situation.

13. Describe how to follow directions properly in a work situation.

14. Complete statements about the importance of written communication.

15. Select from a list ways of using the telephone correctly.

16. Select from a list items to consider when taking a message over the telephone.

17. Describe the basic structure of a memorandum.

18. Introduce yourself and others. (Assignment Sheet 1)

19. Give directions. (Assignment Sheet 2)

20. Use the telephone correctly. (Assignment Sheet 3)

21. Write an internal business memorandum. (Assignment Sheet 4)

SUGGESTED ACTIVITIES

USING EFFECTIVE COMMUNICATION SKILLS IV

PREPARATION

- Obtain materials to supplement unit.

  NOTE: See Suggested Resources.

- Review instructional outline for this unit. Modify time frames to suit class needs and plan activities for each class period.

- Study the specific objectives to determine those you will cover in your presentation. Decide also which objectives should be taught to which students.

- Determine scope and sequence of objectives that you add. Design and develop support materials, including evaluation techniques, for additional objectives.

- Determine how you will schedule time for students to demonstrate competence in the required procedures.

- Make arrangements for guest speakers. Supply speakers with specific objectives and other appropriate sections of the unit.

- Prepare classroom.
  - Put up posters, charts, etc. dealing with basic communication skills.
  - Have articles, brochures, and other items dealing with communication.

DELIVERY

Objective 1

- Survey the class to find out their perceptions about communication, whether they view listening or speaking as more important, their knowledge of body language and telephone skills, and if they have written an internal business memorandum.

- Invite a local business leader in the community to discuss the importance of effective communication on the job; have the speaker discuss the importance of listening, giving and following directions, and using the telephone correctly.

- Discuss terms and definitions. Emphasize that communication is a two-way process.

Objective 2

- Discuss the three purposes of communication.

- Ask students to give examples of the three purposes of communication.

Objective 3

- Show examples of informal and formal writing to class. Point out that in recent years, communication has become much more informal. If possible, read excerpts from letters written during 19th century to illustrate how communication has changed.

- Explain when formal and informal communication would be appropriate today. Discuss how this relates to agribusiness.

Objective 4

- Have students recall instances in which they experienced problems in communication. Ask them how the situation could have been improved.

- Discuss causes of communication problems.

Objective 5

- Have a guest speaker discuss ways to improve communication. (Your school counselor or a member of your local Toastmaster's Club may be good resources.)

Objective 6

- Use Activity Sheet 1.

- Have illustrations or photographs of people cut from magazines. Have students discuss the impression they get of various people and situations from their body language and facial expressions.

- Obtain other resources on "body language" from library or bookstores; provide students with the opportunity to do supplemental reading on the impact of body language, especially in the business world.

Objective 7

- Ask students if they view speaking or listening as more important.
- Show the video *Communications: The Process.*
- Have a guest speaker from a local business discuss the importance of listening skills and why listening is important in the business world.

Objectives 8 through 10

- Ask students to think back for a minute on the impressions they have of persons who made the first move to introduce themselves and those who did not speak and waited for someone to introduce them. Have students come up with a short introduction for themselves and have them practice it.
- Stress the importance of proper social skills in the business world such as knowing how to introduce others; review with the class how to acknowledge introductions.
- Remind students that it is helpful to associate a physical characteristic or physical quality with someone's name, and to view the person as important in order to better remember his or her name.
- Have students complete Assignment Sheet 1.

Objective 11

- Remind students that one aspect of dealing with customers (and co-workers) satisfactorily is proper knowledge of store policies. Emphasize that it is the responsibility of the salesperson to become familiar with his or her employer's policies. Lack of such knowledge may have a negative effect on customer confidence.

Objective 12

- Have students complete Assignment Sheet 2.
- Have students role play various situations in which they must give directions.

- Show the video *Say That One More Time*.

Objective 13

- Invite a local business person to discuss the importance of giving and following directions properly.
- Use Activity Sheet 2.

Objective 14

- Emphasize to students the necessity for written communications to be accurate, easy to read, and to communicate the intended tone or impression to the reader.
- Provide examples of various forms of written communication used in agribusiness.
- If you choose to cover business letters in this unit, invite an English, business communications, or technical writing instructor to discuss basic business writing skills. Ask the speaker to mention tips such as use of transitional expressions, avoidance of cliches, etc.
- If appropriate, use Handouts 1 and 5 on business letters.
- Have students write to Breed Associations and/or agribusiness suppliers for information, catalogs, etc.

Objective 15

- Have students pretend they represent various businesses and role play situations in which they must deal with questions or customer complaints.
- Invite a local disc jockey or representative from a television station to discuss how a person sounds to himself or herself and to others, and how others may perceive him or her differently.
- Use Supplement 1. Have students complete Assignment Sheet 3.

- Videotape students as they role play various situations on the telephone. Let students view the tape to see how they really sound and how they really look to others. Have the class critique the video.

Objective 16

- Make up various situations and have students role play to practice taking telephone messages. Add a few incidents of "difficult" people. After each situation, have class critique.

- Obtain films from the telephone company or have a representative speak to the class on telephone etiquette and how to take telephone messages.

- Emphasize the importance of courtesy.

- Use Supplement 2, Answering Machines.

Objective 17

- Emphasize that written business communication (such as memorandums) are often kept as a legal record of what transpires in a given situation. Point out that this is one reason why accuracy and proper writing techniques are so important.

- Use Supplement 3, Using the FAX machine. Arrange for your students to see a FAX machine demonstrated.

- Have students complete Assignment Sheet 4.

- Use Supplement 4, Electronic Mail. Have your students prepare a report for the class on how "E-mail" could be used by the various agribusinesses in your area. Have a student contact Compu Serve, Inc., a subsidiary of H & R Block, Inc., and prepare an overview of their services with special attention to the agribusiness information service, agricultural news, commodity news service, etc.

  Compu Serve
  5000 Arlington Centre Blvd.
  Columbus, OH 43220
  800-848-8990

APPLICATION

Objective 18

- Use Assignment Sheet 1 to give students practice in introducing themselves and others.

Objective 19

- Use Assignment Sheet 2 to give students practice in giving directions.

Objective 20

- Use Assignment Sheet 3 to give students practice in using the telephone correctly.

Objective 21

- Use Assignment Sheet 4 to give students practice in writing a business memorandum.

EVALUATION

Written Test

- Explain to students that they will be asked to demonstrate on the written test actions listed in the specific objectives.
- Give written test.

  NOTE: The written test may be given in sections if desired.
- Evaluate students on assignment sheet activities if not previously done.
- Reteach and retest as necessary.
- Complete appropriate section of competency profiles.
- Review individual and group performance in order to evaluate teaching methods. Adjust scope, sequence, or instructional approaches for additional lessons as required.

SUGGESTED RESOURCES

Audiovisual Materials

- *Making the Most of Yourself*, Color, 1/2 inch VHS, 14 minutes, Agency for Instructional Technology, 1983. Available from Agency for Instructional Technology, 1111 W. 17th Street, Bloomington, IN 47402, 1-800-457-4509. This film focuses on two characters, one of which is willing to take additional training, adjust his schedule, and keep up his work even when tired. The other is not. It emphasizes how body language, word choice, and voice tone affect communication.

- *Communications: The Process*, Color, 1/2 inch VHS, 25 minutes, Medcom/Trainex, 1986. Available from Medcom/Trainex, P.O. Box 3225, Garden Grove, California 92642, 1-800-472-2479. This film discusses a six-step communication process and covers effective speaking and listening skills.

- *Say That One More Time*, Color, 1/2 inch video, 14 minutes, Agency for Instructional Technology, 1983. Available from Agency for Instructional Technology, 1111 W. 17th Street, Bloomington, IN 47402. This film illustrates how to give directions and covers good and poor telephone skills. The film uses an employee's first day at work, learning how to use the copy machine, as an example of how to give and follow directions.

  NOTE: These videos are available to Oklahoma teachers on a free-loan basis. Oklahoma teachers may order these videos from the Oklahoma Department of Vocational and Technical Education, Resource Center, ATTN: Instructional Media Specialist, 1500 West Seventh Avenue, Stillwater, OK 74074, phone 800-522-5810. Out-of-state teachers must order from the addresses listed with each video.

Software

- *Communications: Your Bridge To Others*, Apple (48K), or IBM (64K). Available from Career Aids, 20417 Nordhoff St., Dept. J 987, Chatsworth, CA 91311, 818-341-2535. This program discusses verbal and nonverbal communication and how to use each effectively. It covers how an employer interprets body language, dress, mannerisms, and posture. Letters of application, follow-up letters, and memos are also discussed.

- *The Listening Inventory,* Apple (48K), Career Aids, 20417 Nordhoff St., Dept. J 987, Chatsworth, CA 91311, 818-341-2535. This program assists students in determining their own strengths and weaknesses in regard to listening skills. Strategies for improving listening skills are included. Includes one disk with back-up, and instruction manual.

Publications

- Eckersley-Johnson, Anna L., ed., *Webster's Secretarial Handbook*, 2nd ed. Merriam-Webster Inc., Springfield, Massachusetts, 1983.
- Sabin, William A., *The Gregg Reference Manual*, 6th ed. Gregg Division, McGraw-Hill Book Company, New York, 1985.

UNIT REFERENCES

- *Agricultural Supplies and Services,* Developed by Iowa State University, Science and Technology, Department of Agricultural Education, Ames, Iowa 50010; and Department of Public Instruction, Career Education Division, Grimes State Office Building, Des Moines, Iowa 50319; Des Moines, Iowa, 1981.
- Brusaw, Charles T., Gerald J. Alfred, and Walter E. Oliu, *Handbook of Technical Writing*, 3rd ed., St. Martin's Press, New York, 1987.
- *Communications*, Instructor's Curriculum, Developed by the Instructional Materials Laboratory, University of Missouri-Columbia, Columbia, Missouri, n.d.
- Cook, William J., *The Joy of Computer Communications*, Dell Publishing Co., Inc., New York, 1984.
- Davis, Steve and Candy Travis, *The Electric Mailbox*, Steve Davis Publishing, Dallas, Texas, 1986.
- *Effective Communication*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1988.
- Hawkinson, Bruce, *Basic Skills in Communication and Arithmetic*, New Mexico State Department of Education, Vocational-Technical Division, Santa Fe, 1977.
- Herr, Edwin L., ed., *Your Working Life: A Guide to Getting and Holding a Job*, Gregg Division, McGraw-Hill Book Company, New York, 1980.

- Lateiner, Alfred, *Modern Techniques of Supervision*, Lateiner Publishing, Stamford, Connecticut, 1978.

- Markel, Michael, *Technical Writing Situations and Strategies*, 2nd ed., St. Martin's Press, New York, 1988.

- Post, Elizabeth L., *The New Emily Post's Etiquette*, Funk and Wagnalls for the Emily Post Institute, Inc., New York, 1975.

- *Speaking and Listening in Vocational Education*, Sweet Home High School, Vocational-Technical Education Department, Oregon State University, Division of Vocational Education, Oregon Department of Education, Oregon Career Development Consortium, Salem, Oregon, 1983.

- Stewart, Bob R., Michael J. McCaskey, and Mark K. Mullinix, *Agricultural Business Sales and Marketing*, Instructional Materials Laboratory, University of Missouri-Columbia, Columbia, Missouri, 1984.

- Townsend, Carl, *Electronic Mail and Beyond*, Wadsworth Electronic Publishing Company, A Division of Wadsworth, Inc., 1984.

- Vanderbilt, Amy, *The Amy Vanderbilt Complete Book of Etiquette*, Doubleday and Company, Inc., Garden City, New York, 1978.

- Wingate, John W., and Carrol A. Nolan, *Fundamentals of Selling*, 10th ed., South-Western Publishing Co., Cincinnati, Ohio, 1976.

BASIC ACADEMIC SKILLS

The following table identifies the basic academic skills that are reinforced in this unit of instruction. These basic academic skills were identified using *The Basic/Essential Skills Taxonomy*, 2nd ed., and verified during the validation process.

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 1	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 2	Language Arts 038	Collects/ Organizes	Information-oral/written	
	Language Arts 132	Comprehends	Information-written	
OBJECTIVE 3	Language Arts 132	Comprehends	Information-written	
OBJECTIVE 4	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 5	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 6	Language Arts 013	Applies/Uses	Definitions	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 7	Language Arts 013	Applies/Uses	Definitions	
	Language Arts 139	Comprehends	Information-written	Context
OBJECTIVE 8	Language Arts 038	Collects/ Organizes	Information-oral/written	
	Language Arts 092	Composes/ Edits	Reports/essays	Information supplying
OBJECTIVE 9	Language Arts 038	Collects/ Organizes	Information-oral/written	
	Language Arts 132	Comprehends	Information-written	
OBJECTIVE 10	Language Arts 038	Collects/ Organizes	Information-oral/written	
	Language Arts 132	Comprehends	Information-written	
OBJECTIVE 11	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 12	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 13	Language Arts 038	Collects/ Organizes	Information-oral/written	
	Language Arts 132	Comprehends	Information-written	
OBJECTIVE 14	Language Arts 013	Applies/Uses	Definitions	
	Language Arts 139	Comprehends	Information-written	Context
OBJECTIVE 15	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 16	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 17	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 18	Language Arts 035	Attends	Directions/tasks	
	Language Arts 071	Composes/ Edits	Oral presentation	
	Language Arts 264	Presents	Informal speech	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 19	Language Arts 038	Collects/ Organizes	Information-oral/written	
	Language Arts 022	Applies/Uses	Study habits/ methods	Prior knowledge
	Language Arts 264	Presents	Informal speech	
	Language Arts 035	Attends	Directions/task	
OBJECTIVE 20	Language Arts 035	Attends	Directions/task	
	Language Arts 119	Composes/ Edits	Social communications/letters	Business
OBJECTIVE 21	Language Arts 035	Attends	Directions/task	
	Language Arts 119	Composes/ Edits	Social communications/letters	Business

BASIC PARTS OF A BUSINESS LETTER

Wood's Feed Store
160 Main Street,
Anytown, OK 00000

Letterhead

March 10, 199X

Date Line

Mr. Tom Harris
1450 Hampshire Avenue
Anytown, OK 00000

Inside Address

Salutation

Dear Mr. Harris:

Congratulations! Welcome to Wood's Feed Store.

Body

Your new job as assistant manager will start March 25. We believe that your experience in agricultural sales will benefit our store greatly. We look forward to working with you.

Sincerely,

Complimentary Close

John Wood
Owner

Signer's Identification Line

JW:dcc

Reference Notation

Tips for writing date, inside address, salutation, body, and complimentary close.

DATE

- Write out month and use numerals for day and year.

  EXAMPLE: February 10, 19XX

- Do not use abbreviations after day of month.

  EXAMPLES: 1st, 2nd, 3rd, 4th

INSIDE ADDRESS

- Should always be typed in three or four lines.
- Should not contain the abbreviations of streets, cities, or counties.
- May include the two-letter abbreviation of the state as authorized by the U.S. Postal Service.

  NOTE: These abbreviations are in all capitals and without periods. Most post offices prefer this type of abbreviation. It is also acceptable to spell out the state.

- MUST include the ZIP code on the last line of the address, following the city and state.

SALUTATION

- Traditionally, use "Dear" followed by reader's courtesy title and last name, followed by a colon.

  EXAMPLE: Dear Dr. Covey:

- If you know your reader fairly well, use "Dear" followed by first name.

- If you do not know the reader's name or title, address the letter to an appropriate department or identify the subject in a "subject line" and do not use a salutation.

EXAMPLES: 1) Barrel Lumber Co.
1010 N. Harris
Fernand, OK 00000

Attention: Customer Service Department

2) Barrel Lumber Co.
1010 N. Harris
Fernand, OK 00000

Subject: Damaged Barn Siding

- If addressing the letter to a group, use the following
  - Ladies and Gentlemen
  - Gentlemen (if all readers are male)
  - Ladies (if all readers are female)

NOTE: The salutation could also be more general, or more tailored to your readers.

EXAMPLES: Dear FFA member, Dear tractor owner

BODY

- Will generally be three or four paragraphs; the first paragraph introduces the subject of the letter and the second and/or third paragraph contains the message.
- Third and/or fourth paragraph concludes the letter.
- Should be clear and concise.
- Should have a positive, courteous tone.
- Should be tailored to reader's interest or viewpoint.

COMPLIMENTARY CLOSE

- Begins after last line of the body of the letter.
- Only first word is capitalized, and the phrase is followed by a comma.

NOTE: Traditional closing phrases are interchangeable today. In the past, some were considered more formal than others.

EXAMPLES: Sincerely, Sincerely yours, Yours very truly, Cordially, Respectfully yours

SIGNATURE

- Should contain writer's full name and business title.
- Should appear signed in ink above typewritten name.

EXAMPLE: Sincerely,

Steven Chapman

Steven Chapman
Executive Director

NOTE: Most organizations prefer that the business title be listed below the name. Some also prefer that the department of the person sending the letter be listed also.

REFERENCE LINE

- Identifies person who is sending the letter and person who typed the letter (if not the writer).
- Person's initials (who is sending the letter) are always listed first and capitalized; the typist's initials are lowercase and separated by a colon or a slash.

EXAMPLE: JH:stl or JH/stl

JH is the person sending letter, stl is the typist

ENCLOSURES

- Enclosures are indicated two spaces below the reference initials.
- *Enclosure* or *Enc.* may be used.
- If more than one enclosure is being sent, the number should be indicated.

EXAMPLE: Enclosure
Enc.
Enclosures 4

NOTATION OF CARBON-COPY DISTRIBUTION

- If a copy of the letter is sent to one or more persons, note this on the original letter and all copies.

COPIES

- The words *Copy to* or *Copies to* or the abbreviation *cc* may be used.

- The notation is made two spaces below the reference initials or two spaces below the last item on the letter.

EXAMPLES: Copy to Harold Jones
Copies to Bill Smith
Harold Jones
cc: Harold Jones

THREE BASIC STYLES OF BUSINESS LETTERS

FULL BLOCK

January 17, 199X

Mr. John Willis, Sales Manager
General Jar Corp.
Commercial City, NJ 00000

Re: Medication Jars

Dear Mr. Willis:

We are trying to locate a source for plastic medication jars for a new product that is being developed. At present we require only about 5 gross for our sales people, but we expect to have greatly expanded requirements in the near future.

We need 2 1/2 or 3 oz jars with screw-on lids, white or ivory, which are resistent to *grease*, *alcohol* and *fruit acids*. We would like to have them imprinted in gold, but could use a label if imprinting is impractical.

Please quote us prices on 1,000 jars, 10,000 jars and 50,000 jars - both plain and imprinted. Please give complete descriptions with your price quotes and send samples. Thank you.

Sincerely,

EQUINE RESEARCH ASSOCIATES

Oscar W. Jones
Oscar W. Jones
Vice President

OWJ:dcc

cc: Henry Brown

MODIFIED BLOCK

January 10, 199X

Mr. John White, General Manager
Expanding Co-op, Inc.
3447 Green Avenue
Metropolis, OK 00000

Dear Mr. White:

As you know, the overall volume of our business has increased 50% within the last few months. This is good for all of us; however, it is creating problems in the shipping department here. We have taken up every bit of slack in our system and have instituted time-saving methods wherever we could, but we are still falling behind on the delivery schedule.

I feel we have reached the point where we simply must add at least four persons to our crew here. Delays on outgoing orders, if they get much worse, may actually hurt us with our customers and undo some of the benefits of the increased volume of business. At the same time our present staff is becoming disgruntled with the constant overload, and we may lose some of our best people.

In view of this situation, I ask your permission to hire at least four new crew members. I know this is beyond our present budget, but is there perhaps a contingency fund that would provide this help? I believe the additional staff would be for the good of the business, now and in the long run. With continued increases, our wage cost should be back in line by April. May I please hear from you immediately.

Sincerely,

James Bufford

James Bufford
Manager

JB:dcc

MODIFIED BLOCK WITH PARAGRAPH INDENTIONS

August 8, 199X

Horse Lover's Monthly
1800 West Avenue
Saddletown, OK 00000

Attention: Advertising Department

Enclosed is a copy of our Stallion Station's advertisement for the coming breeding season. We would like to have an estimate from your publication on the cost of running this ad in one issue, three issues and six issues. We would furnish camera-ready copy.

As you will note, the enclosed copy was originally printed in two colors. We would like to have estimates on a similar two-color job; but we would also like to have your prices for full color. Do you do the color separations in both cases?

A prompt reply will be appreciated.

Sincerely,

Joe Johnson

Joe Johnson
Stallion Manager

JJ:dcc

Enclosure

HOW TO ADDRESS AN ENVELOPE

- Display the same address that appears on the inside address of the letter.
- Address in single spacing, regardless of the number of lines required.

  NOTE: The U.S. Postal Service recommends that the address be typed using all capital letters or written using only black ink. This aids the Postal Service since they are using more electronic scanners to handle mail.

- Always include ZIP code.

  NOTE: Your local post office has a ZIP code directory available to help you locate the proper ZIP codes.

- Do not use symbols or abbreviations unless they are required in specific instances.

  NOTE: State abbreviations authorized by the U.S. Postal Service may be used. See Handout 5.

- Display special references of a personal, confidential, or routine nature a triple space below the return address and three spaces from the left edge of the envelope.
- Display special service notations below the stamp and at least three lines above the address.

  EXAMPLES: Special Delivery, Special Handling, Airmail

- Always include the sender's address in the upper left corner of envelope.

TWO-LETTER STATE AND TERRITORY ABBREVIATIONS

Alabama	AL	Montana	MT
Alaska	AK	Nebraska	NE
Arizona	AZ	Nevada	NV
Arkansas	AR	New Hampshire	NH
California	CA	New Jersey	NJ
Colorado	CO	New Mexico	NM
Connecticut	CT	New York	NY
Delaware	DE	North Carolina	NC
District of Columbia	DC	North Dakota	ND
Florida	FL	Ohio	OH
Georgia	GA	Oklahoma	OK
Guam	GU	Oregon	OR
Hawaii	HI	Pennsylvania	PA
Idaho	ID	Puerto Rico	PR
Illinois	IL	Rhode Island	RI
Indiana	IN	South Carolina	SC
Iowa	IA	South Dakota	SD
Kansas	KS	Tennessee	TN
Kentucky	KY	Texas	TX
Louisiana	LA	Utah	UT
Maine	ME	Vermont	VT
Maryland	MD	Virginia	VA
Massachusetts	MA	Virgin Islands	VI
Michigan	MI	Washington	WA
Minnesota	MN	West Virginia	WV
Mississippi	MS	Wisconsin	WI
Missouri	MO	Wyoming	WY

INFORMATION SHEET

USING EFFECTIVE COMMUNICATION SKILLS

IV

OBJECTIVE 1

Match terms associated with basic communication skills to their correct definitions.

- **Colloquialism**—Area or regional dialect expression
- **Communication**—Exchange of thoughts, feelings, and information by verbal and nonverbal messages
- **Dialect**—Regional variety of a language usually transmitted orally and differing distinctively from the standard language; variety of language whose identity is fixed by a factor other than geography, such as social class or educational level of users

  EXAMPLE: Cajun French

- **Empathy**—Sharing another's emotions and/or feelings
- **Feedback**—Evaluation returned by receiver of information to sender of information
- **Jargon**—Technical language of a particular group
- **Listening**—Receiving, processing, and evaluating both verbal and nonverbal messages from sender
- **Nonverbal**—Involving actions, facial expressions, and gestures but not words
- **Speaking**—Using verbal and nonverbal expression to send a message to a receiver for a particular purpose
- **Speech**—The communication or expression of thoughts in spoken words
- **Values**—Principles or beliefs; what a person believes is important, desirable, and worthwhile

  NOTE: Values are influenced by family, friends, school, and the media.

- **Verbal**—Involving words and not actions

OBJECTIVE 2 **List the purposes of communication.**

- To inform
- To persuade
- To entertain

OBJECTIVE 3 **Name the basic styles of communication.**

NOTE: Communication can be either verbal or nonverbal. Informal speaking involves more use of slang expressions and exclamations.

- Formal

  EXAMPLES: Presentation, speech, legal letter, business letter to someone you do *not* know personally or do *not* know very well.

- Informal

  EXAMPLES: Talking with friends or family, everyday interoffice business communication.

OBJECTIVE 4 **Select from a list causes of communication problems.**

- Failure to see a person as an individual.

  NOTE: Value judgment, stereotyping, and prejudice prevent one from seeing another person as he or she really is.

  EXAMPLES: "All freshmen students behave in certain ways."
  "All FFA members are farmers."

- Failure to listen.

  NOTE: Failure to listen causes a breakdown in communication. The listener fails to hear the real message or what the speaker is really saying if the listener is preoccupied with preparing a reply.

- Use of cliches, automatic responses, colloquialisms, jargon, and filler words.

  EXAMPLES: "You know?" (as an ending to sentences).
  "Process that PO now."
  "Uh, yes; well, you know."

- Interruptions.

  NOTE: Interruptions give the speaker the impression that the listener is in a hurry or that what the speaker is saying is not important.

- Failure to clarify comments.

  NOTE: Failure to clarify comments often leads to misunderstanding. Asking questions may clarify the meaning of a comment.

- Use of limited vocabulary.

  NOTE: Giving examples or clarifying what you are saying helps define terms and leads to understanding.

- False assumptions.

  NOTE: Acting on a false assumption can cause misunderstanding or can prevent one person from getting to know another person.

- Being unaware of how others perceive us.

  EXAMPLE: Some people have no idea what their body language or tone of voice communicates to others.

- Lack of self-confidence.

  NOTE: Fear of rejection or ridicule prevents some people from communicating with others.

- Childhood teachings.

  NOTE: Some people are taught from childhood not to express certain feelings and impulses such as crying, showing anger, or showing affection.

OBJECTIVE 5 **Select from a list ways to generally improve communication.**

- Use "I" messages rather than "you" messages.

  NOTE: "I" messages make the communicator responsible for the feeling being stated. "You" messages are often used to criticize or blame others.

- Choose an appropriate time for communicating.

NOTE: Always try to select a time when the other person will be most receptive to you. When you are unsure as to a "good time," lead off with "when would be a good time for us to get together to discuss the ____________ ?" Do not bring up topics when the other person is emotional, tired, or has received bad news.

EXAMPLES: If the other person is a "morning" person, schedule your talk for that time.

- Indicate your sincere desire to talk.
- Maintain a pleasant tone of voice.
- Use proper grammar.
- Avoid critical or sarcastic remarks.
- Use questions wisely.

  EXAMPLES: To help establish common interest; to see if the listener understands what is being said.

- Use open-ended questions when possible.

  NOTE: This will require the person to give more than just a "yes" or "no" answer.

  EXAMPLE: "What do you like best about school?" (instead of "Do you like school?") The person answering might say, "School is okay—I do like the chance to improve myself through involvement in athletics and FFA."

- Avoid words that may have multiple meanings.

  EXAMPLES: "That was bad!" may mean wrong to someone over fifty but good/great to someone who is younger.

- Practice face-to-face communication.

  NOTE: This is preferred so that nonverbal cues can be observed.

- Observe nonverbal cues.

  NOTE: Approximately 65 percent of communication is nonverbal.

- Use proper listening techniques.

- Provide for feedback.

OBJECTIVE 6

Distinguish between positive and negative nonverbal signs of communication. (Activity Sheet 1)

NOTE: Nonverbal communication or "body language" differs among nationalities and cultures and among social classes.

POSITIVE SIGNS

- Open palm, hands away from body, palms up, arms swinging freely
- Head held high, shoulders upright
- Relaxed, alert manner of sitting or standing
- Smile, pleasant expression

  NOTE: Eye contact should be frequent but not total. Staring is perceived as threatening.

NEGATIVE SIGNS

- Clenched fist, closed body, crossed arms
- Drooping head and shoulders
- Frowning, raised eyebrows, clenched teeth
- Nail biting, pulling at hair or clothing

  NOTE: Nail biting and pulling at hair are perceived as nervousness or fear.

OBJECTIVE 7

Complete statements about ways to listen more effectively.

NOTE: Most people feel they are good listeners, but we remember only approximately 20 percent of what we hear. Active listening is a skill which may be acquired by using certain techniques.

- Prepare to listen.
  - Physically—Eliminate distractions.

    EXAMPLES: Background noise, seating arrangement, interruptions
  - Mentally—Find out about topic beforehand.

- Develop interest—Focus on some aspect of the topic that relates to your life.

- Maintain good eye contact, but do not stare.

- Concentrate—Listen for relevant and irrelevant information.

  EXAMPLE: Your supervisor is discussing company layoffs and states that sales have dropped 50 percent. This reminds her of her early career days, when times were tough and "people lined up for blocks to apply for any job that came up." In this example, a sales drop of 50 percent is relevant, her early career days are irrelevant.

- Have an open mind.

  NOTE: Try to control your emotions, as they affect how you interpret what you are hearing. Overcome prejudice and bias. Do not let slang, accent, fast or slow speaking, or your impression of the speaker's status affect your listening. People often automatically tune out people they dislike or perceive as inferior to themselves.

- Make a mental note of each major point and the speaker's examples.

  NOTE: Avoid jumping to conclusions or letting your mind wander. You may feel you are listening but really are only thinking of how you will reply after the speaker finishes talking.

- Listen for what the speaker is and is **not** saying.

  NOTE: Body language, speaker's manner, and tone of voice may conflict with what the speaker is saying. Conversely, "loaded language" may be aimed at provoking emotional reactions.

  EXAMPLE: The communist menace overseas

- Be empathetic.

  NOTE: Try to understand the speaker's point of view.

- Remember names.

  NOTE: Repeating a person's name aloud often helps you remember it. Recalling names is important in many jobs, especially those which require frequent contact with the public.

- Rephrase key statements in your mind and review what is being said.

- Recognize both main points and details that are important.

OBJECTIVE 8

Discuss how to introduce oneself to others.

NOTE: When in a situation with people you have not met, take the initiative and introduce yourself to others. It will break the ice and most people are friendly if you make the effort. Often, people want to get acquainted but are too shy to make the first move. Taking the initiative is one trait which is especially desirable in the business world.

- Introduce yourself promptly, giving your first and last name.

NOTE: Speak slowly and distinctly.

- Give the other person some information about yourself so that they may talk easily with you and will remember you.

  EXAMPLE: "Hi, I'm Tyler MacKenzie. I just started today. I live on a farm east of town and attend Roosevelt High School."

- If needed, repeat your name during later conversation so it may be remembered correctly.

OBJECTIVE 9

List guidelines for introducing others.

- Introduce men to women.

- Introduce younger people to older people.

- Introduce subordinates to superiors.

  EXAMPLE: "John, I'd like to introduce you to Ms. Jennifer Jennings. She is the general manager of the co-op."

- Introduce others in any order.

- Always give first and last names, speak slowly and distinctly, and mention something about the person so others can speak more easily with him or her and remember the name.

OBJECTIVE 10 **List guidelines for acknowledging introductions.**

NOTE: To remember someone's name, repeat the person's name at some point in the conversation and associate the name with some physical characteristic or quality.

- In business situations, say "Hello" or "I'm very glad to meet you" followed by an informal comment; be sincere.

  EXAMPLE: "It's so nice to meet you. Mr. Helton has told me how much he appreciated your help with the American Agriculture Association."

- Men should shake hands with each other.
- Women may shake hands with each other if they choose to do so.

  NOTE: More women now follow the practice of shaking hands.

- Strictly speaking, it is the woman's place to offer her hand if she chooses; but if the man should extend his hand the woman must give him hers.
- A proper handshake is brief, but there should be strength and warmth in the clasp—and look at the person whose hand you take.

OBJECTIVE 11 **Select from a list types of information needed to clarify store policies.**

NOTE: Many businesses provide training programs for employees concerning company policies. Businesses not offering such programs usually have manuals containing policy information for employees. Some or all of the information below may be helpful when clarifying store policies to customers.

- The image or central purpose of the firm.
- The history of the business, including the date of founding, traditions, and growth and expansion.

- Organization and management of the business, including the type of organization, present officers, and number of stockholders.
- Statistics on business operations, including the size of the plant or store, number of employees, and yearly sales.
- Rules and regulations of the business, including receiving procedures, advertising procedures, and rules for employee conduct and dress.
- Policies of the business, such as buying, pricing, selling, customer service, and personnel policies.

  NOTE: Although most salespersons do not usually determine company policy, it is their responsibility to understand their firm's business policies and follow them. Consistent policies are one important factor in establishing a reputation for honesty and in building customer goodwill.

OBJECTIVE 12

Describe how to give directions properly in a work situation.

VERBAL DIRECTIONS

NOTE: Always explain the reasons why something is to be done when giving directions or orders to avoid misunderstanding or resistance. If the directions are complex or lengthy, write them out in addition to giving them verbally.

- Be sure the person understands:
  - Why it is to be done
  - What is to be done
  - Where it is to be done
  - When it is to be done
  - How it is to be done
- State the directions clearly and simply.
- When possible, decide who is best qualified for the task before assigning it.

WRITTEN DIRECTIONS

- Be sure your written directions are:
  - Complete
  - Concise
  - Clear

  - Correct
  - Courteous

  NOTE: Always write at a level the reader will understand. A new employee or co-worker may need more explanation than one who is experienced at the job.

OBJECTIVE 13

Describe how to follow directions properly in a work situation. (Activity Sheet 2)

- Never begin a task until you have heard (or read) **all** of the directions.
- Be sure you understand the directions.
  - Find out the results you are to achieve.
  - Determine the steps you are to use.
  - Find out what resources you need.
  - Find out what decisions you are authorized to make.
  - Determine when the task is to be completed, including a follow-up review.

  NOTE: If you receive verbal directions, restate them to the speaker to ensure that you understand him or her correctly.

- Ask for assistance or clarification if needed.

  NOTE: It is better to ask for assistance than to do something incorrectly. This not only causes extra time needed to do the task over, but may unnecessarily cost your business in either equipment, supplies, goods, or money.

OBJECTIVE 14

Complete statements about the importance of written communication.

Written communication is important for many reasons. In business it is essential for:

- Conducting the everyday operation of the business.

  EXAMPLES: Recordkeeping, internal and external communications, training and development, advertising, inventory, etc.

- Documenting the legal business transactions or decisions.

  EXAMPLES: Copies of letters, contracts, purchase orders, proposals, policies and procedures, etc.

- Developing and carrying out the company's long and short range plans and objectives.

- Maintaining precise records of the company's business activities.

  EXAMPLES: Medical records of dosages, treatments administered to specific animals in a veterinary hospital; inventory records which are needed for tax purposes, accurate records of business expenditures and income are needed to project the future of the business

- Creating and/or maintaining the company's public image.

  NOTE: Memorandums, business letters, etc. should always convey the intended tone desired by the business. With this in mind, it is imperative that you proofread your written materials for misspelled words and other errors.

OBJECTIVE 15

Select from a list ways of using the telephone correctly. (Supplement 1)

NOTE: During a private telephone call, you represent only yourself. On a company telephone call, you represent your entire company.

WHEN ANSWERING A CALL:

- Answer promptly.

  NOTE: This gives the impression of an efficient business which cares about its customers.

- Use a pleasant voice.

- Identify yourself.

  NOTE: Ask your supervisor for the preferred way to answer the telephone at your place of employment.

  EXAMPLES: "Customer Service, this is Jim."
  "Williams Equipment Company, this is Julie, may I help you?"

- Speak distinctly into the receiver, holding it about an inch from your mouth.

- Use the caller's name often.

- Be friendly.

  - Say, "May I ask who is calling, please?" if caller does not identify himself or herself.
  - Ask "Will you hold or shall I call you back?" when you must leave the line to get information.
  - If the caller is on hold, check back to assure the caller that he or she has not been forgotten.
  - If a caller has been on hold, courteously resume the call.

  EXAMPLE: "Ms. Charles? Thank you for waiting."

- Avoid giving personal information to strangers.

  NOTE: Revealing to a stranger that someone is out of town for a week could result in his or her home or business being robbed.

- Apologize for errors or delays.

- Use correct method when leaving telephone unattended.

  - Press the hold button to cut out noise.
  - Lay the receiver flat if the telephone does not have a hold button.

- If a call is being transferred, tell the caller why the call is being transferred. Mention the number to which a transfer is being made in case the call is disconnected.

  EXAMPLE: "Let me transfer you to extension 263, the sales department. They will be able to answer your questions."

WHEN PLACING A CALL:

- Plan your conversation before calling.

  NOTE: Have any information you may need close by in case you need to refer to it.

- Let the phone ring about ten times or one minute before you hang up.

- **When the phone is answered, state your name, the business you represent, and the reason for the call.**

  EXAMPLE: **"Hello, this is Lisa McConnell from Edwards Farm Store Number Three. I need to speak with someone in your sales department concerning the 510-EH brush-hog."**

- Remember time zone differences when placing your call.

- State, "This is long distance," if you are calling direct.

  NOTE: This will notify the person who answers not to keep you waiting very long. If you get a wrong number when dialing long distance, hang up immediately and call the operator so your business will not be charged for the call.

- When you have completed the call, thank the other party for his or her assistance and hang up quietly.

OBJECTIVE 16

Select from a list items to consider when taking a message over the telephone. (Supplement 2)

NOTE: Telephone systems today are very sophisticated. Be sure your supervisor demonstrates the operation of the telephone system in your business.

- Always write neatly so that the intended information is communicated to whom it is intended.

- All messages should include:

  - The name of the caller and business represented (if appropriate)
  - The date
  - The time
  - The caller's telephone number
  - The message
  - Your name

- Check for understanding. Repeat all of the key information back to the caller to ensure accuracy.

OBJECTIVE 17

Describe the basic structure of a memorandum.
(Supplements 3 and 4)

FOUR-PART HEADING

NOTE: The four-part heading should identify the reason for the memo as accurately and concisely as possible.

- To: (the name of the person(s) and/or department to whom the memo is written)
- From: (the sender's name)
- Date: (month, day, and year)
- Subject: (topic of message)

NOTE: The memo will also have a logo or brief letterhead at the top, and some have a "Copies" or "cc" heading also. Observe your organization's preferred style for writing memos.

BODY OF MEMO

Most memos consist of the following:

- Purpose statement—should convey to the reader why you are giving him or her this information and what you want the memo to accomplish.

  EXAMPLES: To request, to approve
- Summary—should state the main points of the memo.
- Discussion—should state the detailed, technical information; should begin with a background paragraph.
- Action—states what writer will do about a problem or recommends who is to do what and when.

NOTE: Most writers put their initials after their typed names or add their signature at the end of the memo.

EXAMPLE:

To:	All employees
From:	John Wood
Date:	April 10, 199x
Subject:	Annual picnic

Wood's Feed will be holding its annual picnic April 25 at 1:00 p.m. All employees and their families are invited. Please bring a dish of your choice to the picnic. Barbeque beef will be provided. Please let me know how many guests you will be having at the picnic by April 20.

ALWAYS APPLY COMMUNICATION SKILLS

The same basic communication skills apply whether you are telephoning a customer, talking to a co-worker on the office intercom, or using an FM radio communications system in a delivery truck.

Each business will use communications systems such as intercoms or FM radios differently. Become familiar with your business's procedures. There are laws covering the use of FM radios which are regulated by the Federal Communications Commission (FCC). If you use an FM radio communications system you should be aware of the laws that are applicable to you.

Remember—when talking to anyone on a communications system, be courteous and apply basic communications skills.

TELEPHONE ANSWERING MACHINES

More people are using answering machines in their homes and businesses and it appears their use will continue to spread.

Most of the time when you call and the "machine" answers you will hear a recorded message that sounds something like this, "Hello, this is Lee Green. I'm not able to come to the phone right now, but if you'll leave you name, phone number and a short message at the beep, I'll return your call as soon as possible."

And then there are those recordings which are somewhat creative and incorporate celebrity voices, humor, music, etc., which may be appropriate for the home recorder, but not for a business application.

When used for business purposes the answering machine and its "outgoing message" can have either a positive or negative impact on your clients or customers.

Here are some things to keep in mind regarding the use of an answering machine for business purposes:

- Unnecessary humor is *not* appropriate.
- Your outgoing message should sound businesslike, efficient and cheerful.
- Listen to your own message to hear how it sounds to the outside world. If necessary go out and call your own number.
- Use an "outgoing message" like one of these:

"Hello, this is (your name or company name). We cannot answer your call at this time. If you leave your name and number, we will return your call as soon as possible."

"Hello, you have reached 555-4567 (your telephone number). We cannot..."

CAUTION: In your "outgoing message," do *not* say "we are away from the office/home," because a criminal might dial your number, learn you are away, and then make an unlawful entry.

- Always return your calls promptly, even if what you must say is negative or unpleasant.
- When leaving a message on someone else's recorder remember to:
  - State your name clearly and distinctly. Even spell it out if you have a name that is frequently misspelled or mispronounced.
  - Give your phone number.
  - State the time of day and the day of your call.
  - Give the purpose of your call. This will help the other person be better prepared when calling you back.

USING THE FAX MACHINE

Many businesses are now using Facsimile (FAX) machines. FAX machines allow printed matter to be communicated through the telephone lines. FAX numbers (telephone numbers) allow the sender to dial the other FAX machine directly, the same as a local or long distance telephone call. Typed data is converted into electronic dots which are then transmitted through the phone lines, and converted back into printed copy or illustrations for the receiver.

FAX machines are most often used in emergency or "immediate response needed" situations. Machines may cost $1,000 or more and use heat sensitive paper which costs between $20-$40 per roll. Many have memory capabilities which allow, for example, programming a three-page memo and sending it to several FAX numbers in sequence. It takes about 4-5 seconds to transmit an average 8 1/2 x 11 inch typed page. Items with lots of information or lots of solid black ink take longer to transmit. Pencil and light blue ink do not transmit well.

If your agribusiness has a FAX machine, ask your supervisor for specific guidelines on how to use it. Keep in mind that it is a more expensive form of communication.

ELECTRONIC MAIL

The term *electronic mail* (email) refers to the electronic generation, transmission and distribution of messages. It is different from other forms of communication by the fact that it is *not* real-time. Messages can be stored and delivered to the recipient at a later time.

Electronic mail is a new and rapidly growing technology that will, within a few years, change the very fabric of our personal and business communications systems. The emergence of reliable, quick, low-cost communications for small businesses will mean a revolution in the way many companies conduct their business.

Services Offered

There is a whole range of special services offered by the various email companies, some of which will allow you to:

- Send an electronic file from your desk top computer to a high-quality laser printing station in a major metropolitan area near the addressee. There the letter or file is printed out (you can even have the system add a facsimile of your letterhead and signature) and then put into the U.S. Postal Service mails for local delivery.
- Send an electronic file to a laser printing station and have the resulting printout hand-delivered to the addressee in just a few hours.
- Send or receive domestic or international telex messages.
- Send an electronic file to a central computer where it can be converted into artificial speech and "read" to a designated recipient over the telephone.

Special services associated with some electronic mail services include the ability to request "receipts" of delivery when mail is accepted, COD or toll-free mailboxes, and pre-addressed reply notes to incoming mail. You can also automatically send "carbon copies" or "blind carbon copies" of letters to others, and you can create your own lists for automatic mass mailings.

Today, you can send and receive electronic mail in one of three ways:

- By signing up as a subscriber of one of the national electronic mail utilities, such as MCI Mail, Easy Link, Compu-Serve, or The Source.
- By contracting with a national telecommunications network such as Tymnet or Telenet for a specially designed mail service for your company.
- By setting up your own service, based on your company's own computer facilities or those of a timesharing service.
- Some of the services the national electronic mail utilities offer are:
  - Agribusiness information
  - Agricultural news
  - Weather
  - Home banking
  - Home shopping
  - Financial analysis
  - Reference library
  - Education
  - Travel
  - Special interest groups
  - Teleconferencing
  - And many more, too numerous to list

If you would like to know more about electronic mail, the following are suggested resources:

Townsend, Carl, *Electronic Mail and Beyond*, Wadsworth Electronic Publishing Company, A Division of Wadsworth, Inc., Belmont, CA, 1984.

Cook, William J., *The Joy of Computer Communication*, A Dell Trade Paperback, Dell Publishing Co., Inc., New York, 1984.

Davis, Steve and Candy Travis, *The Electric Mailbox*, Steve Davis Publishing, Dallas, Texas, 1986.

ACTIVITY SHEET 1

USING EFFECTIVE COMMUNICATION SKILLS

IV

Approximately 65 percent of a communicated message is transferred nonverbally. To fully understand someone's meaning requires paying as much attention to the person speaking as to the words being spoken. Voice tones, facial gestures, and body language communicate more than the words do.

Part I

Observe nonverbal communication in a group. Attend a sales meeting, go to a livestock show or local business, or simply observe your classmates. List nonverbal communication (both good and bad) that you observe.

Part II

1. Did the techniques you observed improve or detract from effective communication? ______________________

   Why or why not? ______________________

   ____

2. What nonverbal communication techniques do you frequently use? ______________________

   ____

   ____

3. In what areas do you need to improve? ______________________

   ____

   ____

   ____

4. List ways in which you can improve your nonverbal communication skills.

   ____

   ____

ACTIVITY SHEET 2

USING EFFECTIVE COMMUNICATION SKILLS

Following instructions properly can save you frustration, time, and money both on and off the job. The following exercise is designed to help you discover how well you follow written directions.

Your instructor will give you five minutes to complete the following assignment. Do not begin until your instructor tells you to do so. Then follow the directions below exactly. Write your answers on a separate sheet of paper.

1. Read all directions before doing anything.
2. On a sheet of notebook paper, write your name in the upper right corner.
3. Number from 1 to 10, leaving three blank lines between each number.
4. Draw five small triangles beside the number 1 on your paper.
5. Put an "X" in each triangle beside number 1.
6. Put a circle around the number 2 on your paper.
7. Count the number of pages in chapter 3 of any book you have with you now, and write the total beside number 3 on your paper.
8. Multiply your answer by your age at your next birthday.
9. Beside number 9, write the name of one U.S. president.
10. Beside number 4, write today's date.
11. Beside number 5, write the city and state you were born in.
12. Count the number of persons in the room and write the answer beside number 6.
13. Say "I have reached number 13, and I am following directions carefully."
14. Now that you have completed the reading, omit all directions except the first two.

ASSIGNMENT SHEET 1

USING EFFECTIVE COMMUNICATION SKILLS

IV

NAME ______________________________ SCORE _______

OBJECTIVE 18

Introduce yourself and others.

The first impression you make when meeting someone may become a lasting one, so be sure that it is a good one. Social skills such as making proper introductions are very beneficial to you at work as well as in social situations. The ability to make proper introductions smoothes the way for better communication and projects an image of confidence.

Read the following situations and then make the proper introductions in each case. Follow the guidelines as listed in the Information Sheet. Have others in your class role play with you as needed, and have them acknowledge introductions as described in the Information Sheet.

1. Introduce yourself to another person in your class. Tell your real name and give some information about yourself. Talk to the other person briefly and repeat your name if needed.

2. Introduce Sam Sneed, who runs the Co-Op east of town, to your supervisor at the feed and seed store, Carla Crump. Ms. Crump is older than Mr. Sneed.

Make up any information to begin a conversation.

3. Introduce yourself to a prospective employer. Describe your education and work experience as it relates to the position you are interested in.

4. You are the sales manager for a local agribusiness. You are at a meeting to discuss new sales techniques. Introduce your newest employee, Janet White, to the other sales personnel. Then introduce your guest speaker, Jim Webster, to the group. (Make up some information about him).

ASSIGNMENT SHEET 2

USING EFFECTIVE COMMUNICATION SKILLS

IV

NAME ______________________________ SCORE ________

OBJECTIVE 19

Give directions.

No one can follow directions unless the directions given are stated clearly. Giving directions properly is necessary in business because mixups can cause problems in customer satisfaction, loss of productivity, and loss of money. This assignment sheet will allow you to practice your skill in giving directions.

Remember to tell the other person why the task is important.

Choose one of the situations below and give directions to another person in class. Have the person complete the task as nearly as possible based on your directions. At the end of the exercise, evaluate the results. Were your directions clear enough? If not, how could they be improved?

1. You are the manager of a local agribusiness. You have a new salesperson, John Smith. Tell John how the telephone in your agribusiness operates. Then tell him the correct procedure for receiving a telephone call. Make up a reason to telephone and have the person playing John answer the call.
2. Choose a topic you are familiar with and tell another student how to do something. If possible, have the student do the procedure in class.

ASSIGNMENT SHEET 3

USING EFFECTIVE COMMUNICATION SKILLS

IV

NAME ______________________________ SCORE ________

OBJECTIVE 20

Use the telephone correctly.

Often, the first impression (or possibly the only impression) a customer has of a business is a result of a telephone conversation with an employee. If the customer is treated with courtesy and respect then he or she is much more likely to continue doing business with the organization or individual. However, if a customer is treated rudely, or employees cannot answer the customer's questions satisfactorily, then the customer's business is often lost forever. If employees do not answer the telephone promptly, the caller may simply hang up, or may think that the business does not care about its customers.

Review the Information Sheet. Use the following situations to practice your telephone skills and to practice writing a telephone message. Write a telephone message for the first situation. Have another student assist you.

1. Place a call to Ms. Harris informing her that the dog kennel she ordered is in.

2. Answer a telephone call directed to Mr. Thomas, manager of Wood's Feed and Seed. The caller wants to know if Mr. Thomas wants to place an ad in the local newspaper in the special section on the county fair. Mr. Thomas is not in.

IMPORTANT MESSAGE

For ______________________________

Date ______________ Time __________ A.M. P.M..

WHILE YOU WERE AWAY

M ______________________________

OF ______________________________

PHONE NO. ______________________________

TELEPHONED	☐	PLEASE CALL	☐
CALLED TO SEE YOU	☐	WILL CALL AGAIN	☐
WANTS TO SEE YOU	☐	RUSH	☐
RETURNED YOUR CALL	☐		☐

MESSAGE ______________________________

____

____

SIGNED ______________________________

ASSIGNMENT SHEET 4

USING EFFECTIVE COMMUNICATION SKILLS

IV

NAME ________________________ SCORE ______

OBJECTIVE 21

Write an internal business memorandum.

A business memorandum is more than just a means of communication. It is often an item written to persuade, clarify, or order something done. It may even serve as a legal record to document action taken during a difficult situation. For these reasons, it is important that each employee be skilled in memo writing. Review the Information Sheet, and then select one of the situations below and write an internal business memorandum on a separate sheet of paper. Make up names and add any reasonable details. Hand in your completed memo to your instructor for evaluation.

1. You supervise the veterinary assistants at the local veterinary clinic. Write an internal memorandum stating the following change in record keeping policy: all pets will now be listed under the owner's name in the office files instead of being listed by the pet's name and breed. This was implemented because it will prevent errors in mixed breed animals or animals with the same names, and will be easier because all farm animal records are listed under the owners' names. Give the employees a time limit to have the records changed and any other pertinent directions.

2. You are the owner of the local feed store. Business is booming and your staff has a heavy workload already. Today, you received news that one employee, Steve Sumpter, was injured in an accident. He expects to work half-time beginning next week and then full-time again in one month.

   In order to take advantage of the busy season (and avoid paying a new employee, because the agribusiness cannot afford it), write an internal business memorandum to all employees stating that they will have to begin working two hours extra per day until Mr. Sumpter returns to work or the busy season ends, whichever comes first. List reasons for the action and possible consequences if employees do not choose to work extra hours.

ASSIGNMENT ANSWERS — USING EFFECTIVE COMMUNICATION SKILLS — IV

ASSIGNMENT SHEET 1

The following are suggested criteria:

1. Student speaking makes the introduction promptly, speaks slowly and distinctly, and gives some brief information about himself or herself, and repeats name if needed. Student acknowledging introduction repeats the name, and makes an informal comment such as "So nice to meet you," sounds sincere, and shakes hands as outlined in information sheet. Handshakes are firm but do not crush the other person's hand.
2. Same criteria as listed in answers to Problem 1; student speaking introduces Mr. Sneed to Ms. Crump, instead of vice versa.
3. Same criteria as listed in answers to Problem 1, student speaking relates pertinent information, sounds sincere and businesslike. Student acknowledging introduction follows same guidelines as listed for Problem 1.
4. Same criteria as listed in answers to Problem 1, student speaking introduces Janet White to other personnel in any order and gives some brief information about Janet to make it easier for others to remember her; student speaking then introduces guest speaker to the group, giving some information about him. Student playing guest speaker acknowledges introduction and makes informal remarks.

ASSIGNMENT SHEET 2

The following are suggested criteria:

1. Student first told person playing John Smith why proper use of the telephone was important to the agribusiness and then outlined procedure for how to operate the telephone. Guidelines for receiving a call were communicated as outlined in information sheet. The reason for making the call was sufficient for John Smith to practice guidelines for receiving the call.
2. Same criteria as listed in answer to Problem 1, as relevant to procedure or task chosen.

ASSIGNMENT SHEET 3

The following are suggested criteria:

1. Person making the call follows guidelines as outlined in information sheet and shows that he or she has planned the conversation before making the call. After call is completed, the caller thanks the other party and hangs up quietly.

2. Person answering the call identifies himself or herself and the business in a pleasant voice, and follows guidelines as outlined in information sheet. Since the store owner is not in, the student does not give out any specific information. Student keeps a courteous, sincere tone at all times. Student writes a telephone message to Mr. Thomas containing all relevant information about the call.

ASSIGNMENT SHEET 4

The following are suggested criteria for 1 and 2:

Four-part heading is correct, body of memo contains purpose statement, summary, discussion, and suggested action; memo is dated and initialled correctly, is written clearly and concisely and has a polite tone; explains why the situation is a problem and offers a solution (but does not place blame on individuals). Student may add any other relevant information.

WRITTEN TEST

USING EFFECTIVE COMMUNICATION SKILLS

IV

NAME ______________________________ SCORE _______

OBJECTIVE 1

Match terms associated with basic communication skills to their correct definitions. Write the correct letters in the blanks.

____ 1. Exchange of thoughts, feelings, and information by verbal and nonverbal messages

____ 2. Involving actions, facial expressions, and gestures but not words

____ 3. The communication or expression of thoughts in spoken words

____ 4. Evaluation returned by receiver of information to sender of information

____ 5. Technical language of a particular group

____ 6. Principles or beliefs; what a person believes is important, desirable, and worthwhile

____ 7. Involving words and not actions

____ 8. Regional variety of a language usually transmitted orally and differing distinctively from the standard language; variety of language whose identity is fixed by a factor other than geography, such as social class or educational level of users

____ 9. Area or regional dialect expression

___ 10. Receiving, processing, and evaluating both verbal and nonverbal messages from sender

___ 11. Using verbal and nonverbal expression to send a message to a receiver for a particular purpose

___ 12. Sharing another's emotions and/or feelings

a. Values

b. Speech

c. Opinions

d. Nonverbal

e. Dialect

f. Extrasensory perception

g. Colloquialism

h. Empathy

i. Sympathy

j. Communication

k. Jargon

l. Feedback

m. Listening

n. Slang

o. Speaking

p. Verbal

OBJECTIVE 2

List the purposes of communication.

____

____

____

OBJECTIVE 3 **Name the basic styles of communication.**

____

____

OBJECTIVE 4 **Select from a list causes of communication problems.** Write an "X" in the blank before each correct answer.

____ 1. Being unaware of how others perceive us

____ 2. Using gestures

____ 3. Lack of self-confidence

____ 4. Pausing

____ 5. Use of limited vocabulary

____ 6. Interruptions

____ 7. Looking directly at the person

____ 8. Childhood teachings

____ 9. Lack of knowledge

___ 10. Failure to see a person as an individual

OBJECTIVE 5 **Select from a list ways to generally improve communication.** Write an "X" in the blank before each correct answer.

____ 1. Use "you" messages rather than "I" messages.

____ 2. Maintain an authoritative tone of voice.

____ 3. Indicate your sincere desire to talk.

____ 4. Avoid critical or sarcastic remarks.

____ 5. Talk whenever you have the time.

____ 6. Use "I" messages rather than "you" messages.

____ 7. Ignore nonverbal cues.

____ 8. Avoid words that may have multiple meanings.

____ 9. Use questions wisely.

____ 10. Observe nonverbal cues.

____ 11. Use proper listening techniques.

____ 12. Do not allow for feedback, except in serious discussions.

____ 13. Maintain a pleasant tone of voice.

____ 14. Do not look at the person you are speaking to.

____ 15. Do not use open-ended questions because they take too long to answer.

OBJECTIVE 6

Distinguish between positive and negative nonverbal signs of communication. Write a "P" before each positive nonverbal sign and an "N" before each negative nonverbal sign.

____ 1. Head held high, shoulders upright

____ 2. Open palm, hands away from body, palms up, arms swinging freely

____ 3. Frowning, raised eyebrows, clenched teeth

____ 4. Relaxed, alert manner of sitting or standing

____ 5. Drooping head and shoulders

____ 6. Clenched fist, closed body, crossed arms

____ 7. Smile, pleasant expression

____ 8. Nail biting, pulling at hair or clothing

OBJECTIVE 7 **Complete statements about ways to listen more effectively.**
Write the missing word in the blank.

1. Maintain good ____________ contact, but do not stare.
2. Listen for ____________ and irrelevant information.
3. Have an ____________ mind.
4. Rephrase key ____________ in your mind and review what is being said.
5. Remember a persons's ____________
6. Focus on some aspect of the topic that relates to life.
7. Prepare to listen mentally by finding out about the topic ____________.
8. Make a ____________ note of each major point and the speaker's examples.
9. Prepare to listen physically by ____________ distractions.
10. Listen for what the speaker is and is ____________ saying.

OBJECTIVE 8 **Discuss how to introduce oneself to others.**

____

____

____

____

____

____

____

____

____

____

____

OBJECTIVE 9

List guidelines for introducing others. Write three guidelines in the space provided.

OBJECTIVE 10

List guidelines for acknowledging introductions. Write three guidelines in the space provided.

OBJECTIVE 11

Select from a list types of information needed to clarify store policies. Write an "X" in the blank before each correct answer.

____ 1. The image or central purpose of the firm.

____ 2. A vague idea of the business, including the date of founding, traditions, and growth and expansion.

____ 3. Other stores' policies.

____ 4. Policies of the business, such as buying, pricing, selling, customer service, and personnel policies.

____ 5. Rules and regulations of the vendors.

____ 6. Statistics on business operations, including the size of the plant or store, number of employees, and yearly sales.

____ 7. Rules and regulations of the business, including receiving procedures, advertising procedures, and rules for employee conduct and dress.

____ 8. Number of customers and average expenditures.

____ 9. Organization and management of the business, including the type of organization, present officers, and number of stockholders.

OBJECTIVE 12 **Describe how to give directions properly in a work situation.**

VERBAL DIRECTIONS

____

____

____

____

____

WRITTEN DIRECTIONS

____

____

____

____

____

OBJECTIVE 13 **Describe how to follow directions properly in a work situation.**

____

____

____

____

____

____

OBJECTIVE 14

Complete statements about the importance of written communication. Write the missing word in the blank.

1. Conducting the ____________ operation of the business
2. Documenting the ____________ business transactions or decisions
3. Developing and carrying out the company's long and short range ____________ and ____________.
4. Maintaining precise ____________ of the company's business activities.
5. Creating and/or maintaining the company's ____________ image.

OBJECTIVE 15

Select from a list ways of using the telephone correctly. Write an "X" in the blank before each correct answer.

WHEN ANSWERING A CALL

____ 1. Wait awhile to answer, so you will appear busy.

____ 2. Speak distinctly into the receiver, holding it about three inches from your mouth.

____ 3. Identify yourself.

____ 4. Use a pleasant voice.

____ 5. Never apologize for errors or delays that are not your fault.

____ 6. Use the caller's name often.

____ 7. Ask, "Will you hold or do you want to hang up?" when you must leave the line to get information.

____ 8. Say, "May I ask who is calling, please?" if the caller does not identify himself or herself.

____ 9. Check back to assure caller that he or she has not been forgotten whenever you get around to it.

___ 10. Give definite information to strangers.

___ 11. Do not tell caller why a call is being transferred.

___ 12. If a call is being transferred, tell the caller why the call is being transferred. Mention the number to which a transfer is being made in case the call is disconnected.

___ 13. Be friendly.

___ 14. Use correct method when leaving telephone unattended: Press the hold button to cut out noise; lay the receiver flat if the telephone does not have a hold button; lay the receiver against the side of a wall telephone.

WHEN PLACING A CALL

___ 15. Plan your conversation after someone answers the phone.

___ 16. Let the phone ring about ten times or one minute before you hang up.

___ 17. When the phone is answered, give the reason for the call but do not identify yourself.

___ 18. Remember time zone differences when placing your call.

___ 19. When calling directly, do not state if you are calling long distance.

___ 20. When you have completed the call, thank the other party for his or her assistance and hang up quietly only if they really were helpful.

OBJECTIVE 16

Select from a list items to consider when taking a message over the telephone. Write an "X" in the blank before each correct answer.

____ 1. Whether or not the call is important.

____ 2. Time, date, and name of caller and business represented (if appropriate).

____ 3. Always write neatly so that the intended information is communicated to whom it is intended.

____ 4. The caller's home address.

____ 5. The caller's telephone number, the message, and your business's name.

____ 6. The caller's telephone number, the message, and your name.

OBJECTIVE 17 **Describe the basic structure of a memorandum.**

FOUR-PART HEADING— ______________________________

____

____

____

____

____

____

____

BODY OF MEMO— ______________________________

____

____

____

____

____

____

____

____

NOTICE **The following assignment sheets are not a part of the written test. If these activities have not been completed, check with your instructor.**

OBJECTIVE 18 **Introduce yourself and others.** SCORE ________

OBJECTIVE 19 **Give directions.** SCORE ________

OBJECTIVE 20 **Use the telephone correctly.** SCORE ________

OBJECTIVE 21 **Write an internal business memorandum.** SCORE ________

WRITTEN TEST ANSWERS

USING EFFECTIVE COMMUNICATION SKILLS

IV

OBJECTIVE 1

1. j
2. d
3. b
4. l
5. k
6. a
7. p
8. e
9. g
10. m
11. o
12. h

OBJECTIVE 2

- To inform
- To persuade
- To entertain

OBJECTIVE 3

- Formal
- Informal

OBJECTIVE 4

1, 3, 5, 6, 8, 10

OBJECTIVE 5

3, 4, 6, 8, 9, 10, 11, 13,

OBJECTIVE 6

1. P
2. P
3. N
4. P
5. N
6. N
7. P
8. N

OBJECTIVE 7

1. eye
2. relevant
3. open
4. statements
5. name
6. your
7. beforehand
8. mental
9. eliminating
10. not

OBJECTIVE 8

Answer should include the following:

- Introduce yourself promptly, giving your first and last name.
- Give the other person some information about yourself so that they may talk easily with you and will remember you.
- If needed, repeat your name during later conversation so it may be remembered correctly.

OBJECTIVE 9

Answer should include three of the following:

- Introduce men to women.
- Introduce younger people to older people.
- Introduce subordinates to superiors.
- Introduce others in any order.
- Always give first and last names, speak slowly and distinctly, and mention something about the person so others can speak more easily with him or her and remember the name.

OBJECTIVE 10

Answer should include three of the following:

- In business situations, say "Hello" or "I'm very glad to meet you" followed by an informal comment; be sincere.
- Men should shake hands with each other.
- Women may shake hands with each other if they choose to do so.

- Strictly speaking, it is the woman's place to offer her hand if she chooses; but if the man should extend his hand the woman must give him hers.
- A proper handshake is brief, but there should be strength and warmth in the clasp and look at the person whose hand you take.

OBJECTIVE 11

1, 4, 6, 7, 9

OBJECTIVE 12

Description should include:

VERBAL DIRECTIONS

- Be sure the person understands:
    - Why it is to be done.
    - What is to be done.
    - Where it is to be done.
    - When it is to be done.
    - How it is to be done.
- State the directions clearly and simply.
- When possible, decide who is best qualified for the task before assigning it.

WRITTEN DIRECTIONS

- Be sure your written directions are:
    - Complete
    - Concise
    - Clear
    - Correct
    - Courteous

OBJECTIVE 13

Description should include:

- Never begin a task until you have heard (or read) all of the directions.
- Be sure you understand the directions.
- Ask for assistance or clarification if needed.

OBJECTIVE 14

1. everyday
2. legal
3. plans, objectives
4. records
5. public

OBJECTIVE 15

3, 4, 6, 8, 12, 13, 14, 16, 18

OBJECTIVE 16

2, 3, 6

OBJECTIVE 17

Description should include:

FOUR-PART HEADING

- To: (the name of the person(s) and/or department to whom the memo is written
- From: (the sender's name)
- Date: (month, day, and year)
- Subject: (topic of message)

BODY—Most consist of the following:

- Purpose statement—should convey to reader why you are giving him or her this information and what you want the memo to accomplish.
- Summary—should state the main points of the memo.
- Discussion—should state the detailed, technical information; should begin with a background paragraph.
- Action—states what writer will do about a problem, or recommends who is to do what, and when.

OBJECTIVES 18-21

Refer to answers to Assignment Sheets 1 through 4.

OBJECTIVE SHEET

USING HUMAN RELATIONS SKILLS

V

INTRODUCTION

From the time you were born, you have had to deal with people. As you go out into the world of work, your ability to get along with others combined with your job skills will determine whether or not you will be successful in the workplace.

In order to get along with others, you must first understand yourself and how you react to others in different situations. As you learn to evaluate yourself in relationships with peers, co-workers, teachers, family and acquaintances, you will develop human relations skills.

Why bother to learn the skill of human relations? Virtually all jobs today require you to interact with other people. There are many more service organizations today, and larger businesses require you to get along with co-workers, especially the boss. Years ago, walking behind a one-mule plow to till a field took much effort, but little involvement with others. Today, nearly 80% of management duties require human relations skills. Eighty-five percent of all jobs lost are because of the inability to successfully interact with others. By the year 2000, over 50% of jobs will be in industries that provide services.

More important to you, if you are to attain your goals, you have to get along with others and respect their right to be treated equally, to have their own opinions and to be different. Your rights and freedom extend only to the point where they are not infringing on the rights of someone else.

UNIT OBJECTIVE

After completing this unit, the student should be able to analyze and improve upon their personality and relationships with other people. The student will demonstrate these competencies by completing the assignment sheets and written test with a minimum of 85 percent accuracy.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to

1. Match terms associated with human relations to their correct definitions.
2. Select from lists reasons for studying human relations.
3. Select from lists statements about physical and emotional characteristics of personality.
4. Define basic needs that influence lifestyles.

5. Select from a list true statements about characteristics of attitude and their effects on behavior.
6. Evaluate the need for good study habits and pride in work, at school, and on the job.
7. List the problem solving steps in order.
8. List characteristics of a good employee.
9. Identify ways an employee can get along with co-workers, employers, and customers.
10. List benefits of setting goals.
11. Discuss time wasters and how time can be managed more efficiently.
12. List guidelines for making a written time plan.
13. Recognize levels of human needs. (Assignment Sheet 1)

PREPARATION

- Obtain materials to supplement unit.

  NOTE: See Suggested Resources.

- Review instructional outline for this unit. Modify time frames to suit class needs and plan activities for each class period.

- Study the specific objectives to determine those you will cover in your presentation. Decide also which objectives should be taught to which students.

- Determine scope and sequence of objectives that you add. Design and develop support materials, including evaluation techniques, for additional objectives.

- Determine how you will schedule time for students to demonstrate competence in the required procedures.

- Make arrangements for guest speakers. Supply speakers with specific objectives and other appropriate sections of the unit.

- Prepare classroom.

  - Have magazine and newspaper articles pertaining to human relations available to students.

  - Have literature on where students can go for help in your community.

DELIVERY

Objective 1

- Introduce the unit. Stress the importance of human relations training. Use examples of people being fired for poor human relations skills, people receiving promotions and raises for good human relations skills, and the importance of being a productive and cooperative employee.

- Ask an employer from a local agribusiness to speak on human relations skills in the workplace.

- Ask a personnel officer from a large company to speak about employee responsibilities.

- Discuss terms associated with human relations.

Objective 2

- Give students examples of incidents employers have related to you based on experience.
- Use Handout 1, if desired.
- Show the video *Making the Most of Yourself.*

Objective 3

- Discuss with students the importance of understanding their own personality and why it is important for them to be able to evaluate themselves.
- Have a guest speaker from a local clothing store discuss good grooming techniques. Discuss the importance of dressing for the occasion. Explain how sometimes it is just as bad to be overdressed as underdressed for certain occasions.
- Have a counselor discuss emotions and feelings.
- Use Handouts 2 and 3, if desired.
- Have students act out different feelings. You may have them written on slips of paper which they draw out of a sack, or you may assign them a specific feeling with time to prepare. The feelings can be anything: angry, happy, worried, contented, frustrated, jealous, envious, irritated, peaceful, etc. It must be acted out in gesture only - no verbal communication.
- Use Activity Sheet 1.

Objective 4

- Explain Maslow's Hierarchy of Needs using Teacher Supplement 1.
- Use Handout 4 and Transparency Master 1.

Objective 5

- Emphasize the value of self-respect. Explain to students that having self-respect makes it possible to work on self-improvement, makes it easier to respect others, and that no one can respect you unless you show respect for yourself. Explain to students that the presence of self-respect is evidenced by careful attention to personal appearance, proper ethics, and positive relations with others.

- Discuss why some people have little self-respect. Explain that some people take themselves for granted, tend to minimize what they accomplish, and tend to believe that others can accomplish what they cannot. These attitudes are often formed during childhood.

- Ask students to name some characteristics of people with little self-respect. These include rebellious feelings, quiet resentment which builds up until the person blows up at others, withdrawing from others, and anger at himself or herself.

- Use Handout 4, if desired.

- Show the videotape *Practical Planning*.

- Use Activity Sheets 2 and 3.

Objective 6

- Tell students about the relationship between their school habits and their work habits. They overlap and one will carry through into the other.

- Stress that habits can be changed if they have been identified as bad habits.

- Use Handout 6, if desired.

Objective 7

- Discuss with students the advantages of learning to solve problems using the problem solving method.

- Divide the class into groups, present each group with a different problem, and have each group come up with solutions to the problems.

- Use Teacher Supplement 2.

- Use Transparency Masters 2 and 3.

- Use Handout 7, if desired.

- Use Activity Sheet 4.

Objective 8

- Remind students that as employees, they have the responsibility to give their employers sufficient notice when asking for time off, calling in quickly to tell the employer if they will be late, etc. Stress that students should not do or say things which make them appear irresponsible, careless, or untrustworthy, such as "I overslept and will be about an hour late." Instead they should be truthful and take responsibility for the situation, for example: "I'm sorry, I overslept this morning and I'll be there in about 45 minutes; it won't happen again; I'm setting the dual alarm on my clock-radio." OR "I'm sorry, I won't be in this morning; I'm not feeling well and am going to the doctor's at 10 o'clock. I'll keep you informed." Remind students that most employers are very understanding in times of emergency such as deaths in the family, etc. in regard to letting employees have time off, but that employees should not abuse this privilege.

- Invite guest speakers from the business community to talk to the class about employee responsibility.

- Students can visit businesses in the community and observe and listen to the way the employees talk to each other, talk to customers and talk to their supervisors. They could write a report on what they observed.

- Use Activity Sheet 5.

Objective 9

- Use Handout 8, if desired. Handout 5 may also be used with Objective 10.

- Discuss how getting bored on the job can have positive or negative human relations effects. To channel boredom into positive effects, tell students they should always try to find additional work to do (they may have to ask their supervisor), or try to do the same things but in a more efficient way. Gossiping or taking long breaks will not impress your employer.

- Use Activity Sheets 6 and 7.

Objective 10

- Illustrate to students on the chalkboard or overhead projector how to get from one point to another on the map, to illustrate setting a goal. Show how the route can be changed to take in other sights, but the goal remains the same. Relate that to goals we set in everyday life and/or to raising and showing a champion animal at the State Fair or other major stock show.

- Have students keep daily logs of progress they are making toward reaching a goal they have set for themselves.

- Have students follow a specific issue in the newspaper which illustrates a goal that an individual has set or group of people have set and read about the progress on a weekly basis.

- Have students interview individuals in their community who have set goals and achieved those goals.

- Use Activity Sheet 8.

Objective 11

- Discuss examples of time wasters with the class. Have students discuss why and how these factors often interfere with the wise use of time.

- Discuss with students how to set goals and priorities. Then have students make a time plan based on an example used in class. Ask students how they set priorities and how they reward themselves for achievements.

- Have each student keep a log for one day of how each 20-minute segment of the day is used. Have students evaluate their use of time. Have they infringed on the rights of others due to their misuse of time? Have them find out how many hours of time could be better managed to progress toward goals.

Objective 12

- Discuss guidelines for making a written time plan.

- Have students make a written time plan for a goal they have.

APPLICATION

Objective 13

- Use Assignment Sheet 1 to give students practice in recognizing levels of human needs.

EVALUATION

Written Test

- Explain to students that they will be asked to demonstrate on the written test actions listed in the specific objectives.
- Give written test.

  NOTE: The written test may be given in sections if desired.
- Evaluate students on assignment sheet activities if not previously done.
- Reteach and retest if necessary.
- Complete appropriate section of competency profiles.
- Review individual and group performance in order to evaluate teaching methods. Adjust scope, sequence, or instructional approaches for additional lessons as required.

SUGGESTED RESOURCES

Audiovisual Materials

- *Making the Most of Yourself*, Color, 1/2" video, 14 min., Agency for Instructional Technology, 1983. Available from the Agency for Instructional Technology, 1111 W. 17th Street, Bloomington, IN 47402, (800-457-4509). This film focuses on two characters, one of which is willing to take additional training, adjust his schedule, and keep doing his work even when he is tired. The other is not. It emphasizes how body language, word choice, and voice tone affect communication.
- *Practical Planning*, Color, 1/2" video, 14 min., Agency for Instructional Technology, 1983. Available from the Agency for Instructional Technology, 1111 W. 17th Street, Bloomington, IN 47402, (800-457-4509). Mary learns to plan ahead to prevent babysitting emergencies from making her late. Connie helps Lucy understand why others resent her behavior on the job and helps her plan how to do better.

NOTE: These videos are available to Oklahoma teachers on a free-loan basis. Oklahoma teachers may order these videos from the Oklahoma Department of Vocational and Technical Education, Resource Center, ATTN: Instructional Media Specialist, 1500 West Seventh Avenue, Stillwater, Oklahoma 74074, phone 800-522-5810. Out-of-state teachers must order from the addresses listed with each video.

UNIT REFERENCES

Publications

- *See You At the Top*, The Zig Ziglar Corporation, 1977. Available from The Zig Ziglar Corporation, 3330 Earhart Suite 204, Carrollton, TX 75006, (1-800-527-0306).
- "Developing Human Resources," *Personnel Management*, H.J. Chruden & A.W. Sherman, Jr., South-Western Publishing Co., Cincinnati, Ohio, 1980.
- *Distributive Education II*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1976.
- *Employment in Agribusiness*, Mid-America Vocational Curriculum Consortium, Stillwater, Oklahoma, 1984.
- "Human Relations," *Supervisor's Safety Manual* pg 29-47, National Safety Council, Chicago, Illinois, 1985.
- *Interdisciplinary Cooperative Education Curriculum*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1979.
- *Personal Development*, IDECC (Interstate Distributive Education Curriculum), Ohio State University, 1980.
- *Succeeding in the World of Work*, Grady Kimbrell and Ben S. Vineyard, Glencoe Publishing Co., Encino, California, 1986.
- *Successful Human Relations*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1988.
- *Successful Study Habits*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1988.

The following is an explanation of Maslow's Hierarchy of Basic Needs.

PHYSIOLOGICAL NEEDS

- Everyone needs food, air, shelter, clothing and the other essential physical requirements to sustain life. Without food, we starve. Without air, we suffocate. Without shelter we will die from exposure to the elements (cold weather or hot weather). Our basic physiological needs must be satisfied in order to survive.

- Much of our time and energy are devoted to earning a living to provide for the physiological needs of our body. Our wages go to purchasing food, clothing, and a place to live. Our skills and abilities determine how much we get paid for working, and the size of our paycheck determines how much we will have to spend on the basic needs. If our skills are in great demand, we will be paid more. If we have limited skills, we will earn less. Our income will determine whether or not we satisfy our basic need for food with steak or beans and whether or not we live in a penthouse or a one-room apartment.

- In earlier years, before technology was very advanced, people had to spend most of their time plowing, canning, sewing and gathering wood to provide for their basic needs themselves. In today's society, most people purchase their food from the grocery store, buy their clothes from the department store and flip a switch for heat and lights. The basic needs are the same as they were back then, but instead of providing them ourselves, we work and earn money to pay others for growing our food, sewing our clothes and providing our homes with lights and heat.

SAFETY AND SECURITY

- Our safety and security needs require us to prevent accidents that could hurt us physically or protect us from financial loss in the event of an accident or illness. In our day to day living, we should try to complete tasks in the safest way to prevent injury to ourselves or others. Many companies routinely conduct safety training sessions for their employees to develop a sharp sense of safety on the job. A person's security can also be derived from insurance that will help protect them from financial loss, or pay for medical bills in the event of illness or injury. An employee can develop a sense of job security if they perform their duties in a professional manner, producing quality work in the minimum amount of time. When we know our safety needs and physiological needs are being met, we have more time for our attention needs.

ATTENTION NEEDS

- Each person has a desire to belong to a group or be a member of a team because they desire social acceptance. This stems from the early years of development as a member of a family. Each person has a desire to be loved and needed by other people. Sometimes this need causes a person to seek membership in organizations involved in activities that are interesting to the individual, such as a bowling team, swimming team, football team, baseball team, FFA or informal groups of peers that have similar interests or goals. Sometimes a person can get drawn into a group of peers that is involved in activities that can bring about negative results in a person's life such as using drugs, drinking excessively or breaking the law. Sometimes the need for attention can cause a person to be influenced by their peers into doing something wrong that they would not do if they were by themselves.

- Attention needs can provide positive motivation for a worker to do an excellent job, so they will be recognized and accepted by their peers at work. Everyone needs to be aware that the need to be socially accepted on the job, at school, by peers, and at home can produce either positive or negative results, depending on the situations they are confronted with.

ESTEEM AND SELF-RESPECT

- When the first three basic needs have been met, a person gains more confidence, and can feel good about themselves and the job that they are responsible for performing. As they get positive feedback from others at work, at home, at school, and among peers, about a job well-done they can feel satisfied with what they have accomplished. When this happens, they respect themselves and are usually respected by others.

SELF-ACTUALIZATION

- Self-actualization is achieved by doing the best that you can do and applying all your skills and abilities to achieving your goals. It does not mean that you have to be better than someone else in order to experience self-actualization.

- Many never reach their top goals and no one feels self-sufficient all the time, just as you tend to get hungry again and need to concern yourself with providing for the basic needs of your body. Life is full of ups and downs and pressures and needs from all five of Maslow's basic needs. In order to reach the self-actualization step, all other needs must be provided for by the individual.

- By understanding our basic needs and realizing how they affect the way we set goals and manage our time, we can take control of our lives and determine what goals to set for our future. Understanding our basic needs will also help us manage our time better so that we can allow the necessary time in our lives to fulfill all our basic needs as we progress through our life-stages.

- In order to be able to get and keep a job to provide for our basic needs, we must have good human relations skills. The more we understand our basic needs, the more we can understand the basic needs of others and be able to understand what motivates others we come into contact with on the job, at home, and at school.

- Our basic needs have a great influence on the decisions we make and the solutions we select to solve our day-to-day problems. If we are hungry, we cannot concentrate on schoolwork or work on the job. If we have been injured, we cannot carry out our job responsibilities. If we are rejected by others, we do not feel like we can do anything right. By understanding how these basic needs effect us, we can focus on the actual problem and hopefully come up with solutions that will help us reach our potential.

Use the following in your discussion of the problem solving steps and decision making skills.

By going through the problem solving process, you can usually delay an impulsive action that will be ruled strictly by your emotions that you will regret later. Once an action is taken or angry words are spoken, they cannot be taken back. We can apologize, but that will not completely remove the effect of our words. If we strike out at someone with anger with our fists, we cannot take back the hurt we have inflicted.

If we learn to identify and recognize what the real problem is we have a better chance of solving it rationally, but if we deny there is a problem when there actually is one, it will only get harder to solve.

There are many problems that new inventions and products have been able to solve. Take, for example, the problem of storing hay. Someone invented the hay baler to solve that problem. Then someone improved upon the idea and created the round bale which has greatly increased the efficiency of handling and storing hay. As our world changes and technology increases, we are confronted with an ever-changing environment with new problems that must be identified and solved.

As you practice solving problems using the problem solving steps, you will find that some problems will be easier to solve. Whether the problem involves human relations, problems on the job or problems encountered with the environment, your problem solving skills will help you reach the goals you set for yourself.

BASIC ACADEMIC SKILLS

The following table identifies the basic academic skills that are reinforced in this unit of instruction. These basic academic skills were identified using *The Basic/Essential Skills Taxonomy*, 2nd ed., and verified during the validation process.

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 1	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 2	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 3	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
	Free Enterprise 114	Describes/ Explains	Needs/wants	
OBJECTIVE 4	Language Arts 013	Applies/Uses	Definitions	
	Free Enterprise 114	Describes/ Explains	Needs/wants	
OBJECTIVE 5	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 6	Language Arts 088	Composes/ Edits	Reports/ essays	Editorials/ opinions
	Language Arts 092	Composes/ Edits	Reports/ essays	Information-supplying
	Language Arts 249	Infers/ Predicts	Information-written	Cause/ effect relationships
OBJECTIVE 7	Language Arts 147	Comprehends	Information-written	Sequence
OBJECTIVE 8	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 9	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 10	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 11	Language Arts 092	Composes/ Edits	Reports/essays	Information-supplying
OBJECTIVE 12	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 13	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 013	Applies/Uses	Definitions	
	Math 229	Solves problems	Generate conclusions	Deductive reasoning
	Language Arts 278	Uses	Text resources	
	Science 043	Applies/Uses	Models/theories/laws	

USING HUMAN RELATIONS SKILLS GUIDELINES

We are not alone on this earth. How rich and full our lives become depends upon our ability to relate to those around us. Listed below are some guidelines for better human relations.

- Learn to understand and like yourself.
- You will always have problems—learn to cope—make better decisions.
- Be aware that others have problems, too.
- Help where you can; encourage where you can't help.
- Be honest, especially with yourself.
- Be optimistic; it's all in how you look at things.
- Never argue. Your silence will be more convincing than confrontation.
- If you are wrong, say so. We learn and grow by our mistakes.
- Be as dependable as you want others to be for you.
- Forget excuses; reasons may be acceptable, especially as a basis for change.
- A smile costs nothing, creates interest, and yields great returns.

HANDOUT 2 | **USING HUMAN RELATIONS SKILLS** **V**

SELF EVALUATION

DIRECTIONS

Evaluate your feelings about yourself. Be honest. This is not what you think you should feel, but what you *do* feel. Use the following to evaluate each question:

A = always
S = sometimes
U = usually
N = never

____ 1. I do not criticize my family and friends.

____ 2. I am a good loser.

____ 3. I am honest with myself and others.

____ 4. I like to be alone.

____ 5. Other's opinions do not hurt me.

____ 6. I freely express my own opinion.

____ 7. I feel I am as good as everyone else.

____ 8. I like lots of attention.

____ 9. I am a modest winner.

____ 10. I feel guilty.

____ 11. I try to prove I am as good or better than others.

____ 12. I like myself.

____ 13. I can accept compliments without being embarrassed.

____ 14. I feel I must defend my opinion.

____ 15. I brag about myself.

____ 16. I choose friends who agree with me.

____ 17. I am willing to admit mistakes.

____ 18. I use excuses.

____ 19. I am friendly and confident around strangers.

____ 20. I can take criticism.

HOW DO YOU FEEL ABOUT YOURSELF?

Part I

INTRODUCTION

Take a look at yourself. How you look reveals much of how you feel about yourself. It will also create the first impression people have of you. You must make the most of what you have. Though you must live with your bone structure, coloring, height, and other physical characteristics, you can do much to create the appearance you wish. First, accept yourself. Second, remember a smile communicates that you feel good about yourself.

The following asks you to take a look at yourself. Place an "X" in the category that best fits your thinking. Be prepared to explain "how" if you marked "can be changed."

Characteristic	*Must be accepted*	*Can be changed*
1. Height		
2. Bone structure		
3. Weight		
4. Skin coloring		
5. Hair coloring		
6. Eyes		
7. Hands		
8. Nails		
9. Feet		
10. Teeth		

Explain your responses in the "can be changed" column:

Part II

INTRODUCTION

Emotions are your feelings. While you may be able to hide your feelings, they do determine your attitudes and behavior. Attitudes present the front people see and behavior is the action that results from feelings and attitudes.

People learn to hide their feelings because they are so vulnerable to hurt. In order to protect them we hide them from the world, and we develop attitudes for the benefit of the observer. How many times have you smiled or blustered aggressively to hide the hurt inside? How many people do you know whom you called phoney? Is it because they have assumed a front in order to hide their anger? insecurity? need to be loved? If you have had to do the same you can understand that, though they do not communicate the problem, you can at least be aware there is a problem and thus have more compassion toward them.

In the following examine your own feelings. Write the appropriate letter in the blank spaces below.

A = always
O = occasionally
U = usually
R = rarely

_____ happy
_____ moody
_____ loving
_____ sensitive
_____ angry
_____ indifferent
_____ caring
_____ frightened
_____ insecure
_____ agreeable
_____ satisfied with self
_____ satisfied with others
_____ unfriendly

_____ secure
_____ tense
_____ irritable
_____ sad
_____ unhappy
_____ dissatisfied with self
_____ hurt by what others say or do
_____ pleased
_____ resentful
_____ annoyed
_____ joyful
_____ worshipful
_____ disagreeable

I LIKE MYSELF BECAUSE I AM...

DIRECTIONS Circle the words that describe you.

Part I

- friendly
- healthy
- assertive
- good at communicating
- ambitious
- diligent
- grateful
- taking action
- interested in my job
- generous
- open-minded
- happy
- resourceful
- proud
- gifted
- considerate
- mature
- gracious
- content
- courteous
- well-groomed
- energetic
- concerned with others
- organized
- sensitive
- expressive
- self-confident
- aware of limitations
- caring
- loving of others
- soft-spoken
- quiet
- hopeful
- eager
- sincere
- attentive
- humble
- loyal
- honest
- persistent
- enthusiastic
- committed to self-improvement
- self-motivated
- creative
- agreeable
- persuasive
- in control of emotion
- supportive
- warm
- forgiving
- witty
- tolerant
- patient
- cheerful
- discerning
- thorough
- thrifty
- attractive
- optimistic
- understanding
- striving for excellence
- a good manager
- orderly
- dependable
- interested in school
- good at speaking before groups
- calm
- sweet
- fair
- intelligent
- peaceful
- gentle
- decisive
- punctual
- wise
- well-dressed

Part II

From the words that you circled, list what you feel are your major strengths.

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________

HOW PREJUDICED ARE YOU?

Stereotypes are a form of prejudice. First impressions are frequently based on stereotyping; for example, complete each of the following sentences with stereotypes you *have heard*—not necessarily your own opinion.

All Indians are...

All Blacks are...

All Whites are...

All Japanese are...

All Russians are...

All young people are...

All old people are...

All boys with earrings are...

All bankers are...

All insurance salesmen are...

All custom harvesters are...

A 30-year old woman with glasses, severe hairdo, old-fashioned clothes is...

A politician is...

An old man in overalls is...

A thin studious man with glasses is...

A frilly blonde is...

A macho athlete is...

A long-haired, sloppy young man is...

Look back over your list. Would your own impressions be a fairer assessment of people you have come to know better?

COMPARE SCHOOL AND JOB

Below are listed human relations skills. Place an "S" for those most important in school. Place a "J" for those most important on the job. If they are important to both school and on the job, then mark them for both.

_____Respect others

_____Accept responsibility

_____Be punctual

_____Be confident

_____Be creative

_____Dress appropriately

_____Be cooperative

_____Be a leader

_____Be self-controlled

_____Be loyal

_____Be assertive

_____Be neat

_____Be willing to do more than asked

_____Be honest

_____Set goals

_____Practice good health

____ Be understanding

____ Be patient

____ Be part of a team

____ Be reliable

____ Be interested

____ Be interesting

____ Be compassionate

____ Be flexible

____ Be optimistic

____ Be industrious

____ Have integrity

____ Keep smiling

____ Take initiative

____ Be polite

____ Be fair

____ Be able to take criticism

How many traits were the same for both?__________

Which ones do you need to work on the most? ______

PROBLEM SOLVING

This handout presents a problem and works through its solution using the steps to problem solving found in the Information Sheet.

THE PROBLEM

You are owner of one of the largest farms in the county and you raise a lot of alfalfa hay for your own use as well as for sale. You also do custom baling for a number of the surrounding farms.

Today is August 15 and just as you are about to leave the house the phone rings. It's one of your employees, Steve Smart. Steve says, "You know I'm working over at the Johnson's place...I was just about through putting up a load of hay in his barn, when Mr. Johnson comes out to see how things are coming along...then he gets all upset...something about the small bales...and accuses me of trying to rip him off. I don't know...I've done this job like the rest...You better come quick."

As you drive over to the Johnson's, you try to figure out what could have gone wrong. Steve knows his job. He has been baling hay for over five years. He is a hard worker. Ray Johnson has been a good customer and neighbor for a long, long time...and you sure don't want to lose his business. Then a couple of Steve's comments come back to you, "small bales" and "I've done this job like all the rest."

1. **Recognize the problem:**
   - One of your best customers is upset and feels he is not getting what he contracted for.
   - There has been a breakdown in the communication between you and Steve regarding this job.
2. **Get the facts:**
   - You and Ray had agreed that the bales coming from this cutting would be packed tighter and slightly heavier than normal.
   - Steve did not see your note telling him to adjust the baler to produce the heavier bales.

- Steve still has one-half of the field yet to be baled.
- The bales in Ray's barn are the normal size.
- For some unknown reason, Ray seems to be over-reacting in this situation.

3. **Weigh the facts:**
   - Ray is right. The bales are not according to your agreement.
   - You want to maintain a good business relationship with Ray.
   - You see there needs to be a better way to handle the job assignments with Steve.
   - You have two options:
     1) Adjust the baler and proceed according to the original agreement.
     2) Adjust the agreement to accommodate the smaller bales.
4. **Determine the objective:**
   - To maintain your customer's goodwill and provide him with the type of service and product he had contracted for.
   - To improve the communications between you and Steve.
5. **Make a decision:**
   - You decide you are going to accept responsibility for the problem and to apologize to Ray for the mix up and resulting inconvenience. Also you will ask him which of the two options he prefers.
   - Then as soon as the immediate situation is taken care of, you and Steve are going to discuss some ways to improve your communications in order to keep this type of situation from occurring again.
6. **Take action:**
   - Apologize to Ray Johnson and explain what happened.
   - Ask Ray how he prefers the situation be resolved.

- Complete the job according to the solutions agreed upon.
- Work with Steve on improving the communication between the two of you.

7. **Check results:**

- Keep close touch with Ray and Steve while the rest of the baling is in progress.
- Monitor the size and weight of the bales yourself.
- Follow up with Ray when the job is completed to ensure that he is satisfied.
- Follow up with Steve as he starts each custom job.

WAYS TO AVOID DIFFICULT SITUATIONS

- Show respect for the rights of the other person; do not infringe upon their rights.
- Accept the other person for what she or he is; show respect for a person's individuality.
- Treat the other person as you would like to be treated.
- Listen attentively to what the other person has to say.
- Carefully observe the behavior of the other person; pay particular attention to nonverbal signals (facial expression, postures, gestures, eye contact, personal appearance). Notice whether or not these signals tend to agree with what the person is saying.
- Be sensitive to the emotions of the other person.
- Analyze the words, actions, and emotions of the other person.
- Ask relevant questions when clarification or additional information is needed.
- Speak in a friendly manner; try to make the other person feel at ease.
- Show your interest in the other person by using appropriate facial expressions, gestures, eye contact, etc.
- Share similar situations and events from your own experience.
- Express your own thoughts and feelings when appropriate; be open.
- Offer assistance when appropriate.
- Sympathize with the other person when you are in agreement.
- Respect the property of others; do not use it or borrow it without permission.
- If you borrow something treat it with respect and return it in good shape.

- Show your compassion when the other person is feeling low.
- Show your enthusiasm when the other person is happy, successful, or in need of encouragement.

330

INFORMATION SHEET

USING HUMAN RELATIONS SKILLS

OBJECTIVE 1

Match terms associated with human relations to their correct definitions.

Imagine your champion Quarter horse stallion is about to be operated on and you heard the vet say, "Hand me that doo-hickey and that thing-a-majig." Your reaction would probably be, "Let's get out of here!" You expect a veterinarian to know the names of the tools.

While not so life-threatening, the words listed here are tools in studying about yourself and others. Learn them, but more importantly, understand them so that you will be well-equipped to relate to others on your job, at home, and at school.

- **Ability**—A skill that has been developed

  NOTE: A skill to perform a task such as tune an engine.

- **Aptitude**—Potential or knack for having; a natural ability, a family trait, innate
- **Attitude**—Feeling or emotion
- **Authority figure**—Person in power or one who gives commands
- **Defense mechanism**—Behavior used to cope with difficulties
- **Ethnic group**—Race or group of people with similar customs
- **Human relations**—Interaction between people and learning to accept them as they are
- **Interests**—Activities a person enjoys doing most
- **Morale**—Atmosphere or feeling prevailing in a workplace, home, school, or other type of living environment
- **Motivate**—To stimulate an interest in work through meeting needs and appealing to employee's interests
- **Personality**—All the physical, mental, and emotional characteristics that make up a whole person
- **Prejudice**—Attitudes, judgments, or opinions formed before the facts are known

- **Respect**—Recognizing the worth of self and worth of other people, their property, and opinions

- **Self-concept**—How people feel about themselves

- **Success**—Making progress toward achieving a worthy goal

- **Values**—The ideas, relationships, and other matters that a person believes to be important

OBJECTIVE 2

Select from lists reasons for studying human relations.

"You are fired!" rang in Bill's ears as he collected his possessions from his desk and dejectedly walked out of the bank. What was he going to tell his wife? The boss had told him that he had to let him go because he couldn't control his temper when his supervisor would tell him how to do his job more effectively. Bill had to admit to himself that his former boss was right. He had always resented having someone tell him what to do. It made him feel like he didn't know anything, so he always acted upset when anyone tried to show him how to do his job. He realized now that his inability to get along with his supervisor and his stubbornness had gotten him fired.

- There are many skilled people who have the technical knowledge needed to carry out specific job duties, but they have not learned good human relations skills.

Some of the reasons for learning good human relations skills are:

- You will be able to improve social relationships.

- You will learn to cooperate with:
  - co-workers
  - employers
  - customers
  - family members

- You will understand yourself better.

- You will be able to assess situations with people more accurately.

- Good human relations skills will help you keep your job.

- You will enjoy interaction with people on the job more so that you will be more satisfied with your job.

332

- You will be able to cope with problems more realistically, focusing on the facts of a problem rather than allowing personalities to solve a problem.

- Business must treat all customers equally, regardless of race, sex or religion.

- There are more service-oriented businesses which require employees to have good human relations skills.

- Reaching one's goals often depends upon the ability to get along with others.

- Many businesses use group-oriented activities to achieve the goals of the business which require good human relations skills.

OBJECTIVE 3 **Select from lists statements about physical and emotional characteristics of personality.** (Activity Sheet 1)

In order to get along with others, we must be able to identify our emotional and physical characteristics and be able to recognize the impact these characteristics have on our lives. Because we live in an ever-changing world, our ability to assess and evaluate our personal characteristics will determine how well we adjust to the changes in society and in our personal lives.

By becoming aware of our own characteristics, we will become more sensitive to the differences in emotional and physical characteristics of others, which will help us relate to others in a more positive way.

We are born with a unique set of physical characteristics that no one else possesses. Our chromosomes are a mixture of all characteristics that our ancestors have shared from generation to generation. That is what makes each of us very unique individuals with our own individual set of physical characteristics. You will pass these characteristics on to your children. Some of these characteristics cannot be changed.

The influences of our cultural and environmental surroundings help shape our emotional characteristics which include our attitudes, values, religious beliefs, interests, and self-concept. Emotional characteristics can be changed by us if we recognize that some of our emotional behavior is creating problems in our lives. By evaluating ourselves, we can identify and change so that we can take better control of our lives to achieve the goals that we set for ourselves. By identifying our weaknesses and strengths, we can improve our behavior and understand the behavior of others we come in contact with at work, at school, and in our homes.

Physical characteristics of personality:

- Must be accepted - body structure.

  EXAMPLES: Height, bone structure, skin color, foot size, arm length, and finger length

- Can often be altered - body appearance.

  EXAMPLES: Diet, use of make-up, careful clothing selection, posture, dental work, good hair care, proper care of nails

- Can determine the first impressions to a great extent.
- Can affect our self-image.
- Can affect our self-confidence.

Emotional characteristics of personality:

- Are displayed through our behavior toward other people.
- Are influenced by our feelings and values.
- Can be improved by expressing one's emotions in a positive way resulting in a common understanding between individuals, which result in creating a friendly atmosphere rather than a hostile one.
- Causes of emotional behavior may be the opposite of what they appear.

  EXAMPLE: Being jealous of someone's success or talent does not mean that you dislike that person, but that you feel insecure about your own skill or talent.

- Emotions should not cloud our evaluation of the facts of a situation.

  EXAMPLE: If a co-worker has said something that has upset us, and we have to evaluate that person's performance of his or her duties, we should set our personal feelings about that individual aside so that we can fairly evaluate the actual job performance based on quality and quantity of work produced. Do not let personal feelings cloud our judgement of the facts.

- Reflect the way we feel about ourselves.
- Reflect the attitudes we have learned from infancy.
- Are influenced by our religious beliefs.
- Are sometimes influenced by hormonal changes that occur during the physical changes our body goes through during our life-cycle.

  EXAMPLE: Going through puberty or the aging process.

OBJECTIVE 4

Define basic needs that influence lifestyles.
(Transparency Master 1)

Have you ever sat in class with your stomach rumbling from hunger? Can you recall how little you remember or heard of what the teacher was saying? If so, you can relate to Abraham Maslow's theory of basic needs.

People have five basic needs that Maslow, a well-known psychologist, identified. These must be met in order to reach a person's full potential. These five basic needs are:

1. **Physiological needs**—Food, water, air, shelter, clothing, sex, sleep, and physical survival.
2. **Safety and security**—Being free from injury, life insurance, job security.
3. **Attention needs**—Social acceptance and belonging to a group, social activity, peer acceptance, or being a member of a specific group or member of a team.
4. **Esteem and self-respect**—Positive feedback that a person gets from others, feeling good about oneself, being proud of a job well done, satisfaction in what has been accomplished, ego.
5. **Self-actualization**—Self-sufficiency, feeling of relevance, the vitality of having achieved one's goal, exhilaration of success, feeling a sense of completion and reaching the peak of perfection when you do the very best. Self-actualization is not a permanent high. There are times when the exhilaration or a "peace beyond understanding," comes from having accomplished the first four basic needs, and everything in a person's life is working out, resulting in a sense of happiness and individual accomplishment.

OBJECTIVE 5 **Select from a list true statements about characteristics of attitude and their effects on behavior.** (Activity Sheets 2 and 3)

- Our attitudes are a result of past learning experiences and are a feeling or emotion we have toward a specific fact or situation. Our attitudes can continue to change as we acquire additional knowledge, information, and experience throughout our lifetime.
- Our attitudes reflect the way we feel about our family, school, co-workers, friends, our boss, or anyone else we come into contact with on a day to day basis. Our attitudes are affected by the following "three sides of self."
  - The person you think you are - the mental picture you have of yourself
  - The person others think you are - how the people who come into contact with you actually see you
  - The person you really are
- If you picture yourself as a well-groomed, mannerly person, you will behave and act like a well-groomed, mannerly person and you will take more time with your appearance to live up to the image you have of yourself. Others will react in a more positive way toward you. On the other hand, if you visualize yourself as being macho, you will probably act that way and other people will react negatively toward you.
- If a person has a good self-image and is willing to put forth the effort to continually improve, he or she will have a much better chance of getting and keeping a job. Employers appreciate employees who have positive attitudes about themselves, their co-workers and their work.
- On the other hand, if a person does only enough to get by on their job, and they have the attitude that the world owes them a living and that they were hired to just slide by with as little work as possible, they will probably be out job-hunting in a short time.
- Our attitudes provide our motivation, affect our morale, influence the way we treat others and directly affect our success in reaching our long term goals.

OBJECTIVE 6 **Evaluate the need for good study habits and pride in work, at school, and on the job.**

Habits learned in school carry over into the world of work. Hard work produces results wherever it is applied. Employers are looking for employees who have developed the ability to learn new processes and who take pride in their work.

Some of the characteristics that have been learned in school and apply to the work world are:

- Accuracy in performing operations
- Ability to follow directions and instructions accurately and without repetition
- Speed in performing operations; amount of acceptable work produced
- Capacity for remembering necessary details, figures and instructions
- Initiative and resourcefulness in solving problems
- Ability to maintain harmonious working relations with others
- Physical fitness for the work
- Ability to work under pressure or abnormal conditions, such as meeting deadlines, multiple assignments and extra work
- Industry - thinking of new ways to do tasks quicker
- Neatness, orderliness, and maintenance, or arrangement of work area, such as desk, files and floor
- Does not use excessive time in personal phone calls, going to the restroom, and other personal activities
- Ability to make judgments or decisions quickly and accurately
- Natural ability and aptitude for the job
- Acceptability of work; within acceptable work standards for the job
- Ability to organize work
- Ability to suggest improvements in work techniques and operations

OBJECTIVE 7

List the problem solving steps in order.
(Transparency Masters 2, and 3, Activity Sheet 4)

We are faced with problems we must either solve or learn to cope with in our daily lives. We come into contact with other human beings with the same basic needs that we have to consider when making decisions and reacting to situations.

The way in which we learn to identify and solve problems can have far reaching effects, not only on ourselves, but on others around us. If we learn how to identify the basic process of solving a problem, we can apply it to all areas of our lives - on the job, at home, at school, and in peer relationships.

The basic steps to solving a problem are:

1. Recognize the problem.

   NOTE: The real problem may not be what it first appears to be, but rather, a symptom of the problem.

2. Get the facts.

   NOTE: Seek out all the facts, not just the facts we want to hear or collect. The more facts you gather, the better your decision will be.

3. Weigh the facts.

   NOTE: Give careful consideration to all the facts you have gathered and assess the importance of each one.

4. Determine the goal or objective desired with the solving of the problem.

5. Make a decision from several possible solutions.

   NOTE: Some people find it helpful to list the facts or alternatives on a sheet of paper in their order of importance to the individual. They also list the pros and cons to each alternative and the possible consequences or results of each solution. The best solution can be gradually elected by a process of elimination.

6. Take action to solve the problem.

   NOTE: Unless action is taken to solve the problem, the problem will exist indefinitely.

7. Check the results of your actions to determine whether or not your solution to the problem is working, if it is not, re-evaluate the situation and go through the process again until the desired results are obtained.

As you face each day, you will have many decisions to make. Many decisions are made without much thought because you have established a habit of handling different situations you encounter. Minor problems such as which foot you put your sock on first, or whether to button your shirt from the top down or the bottom up, do not require deep thinking or any thinking at all. You just do it the way you learned how. The results are the same either way - your shirt is buttoned and your socks are on your feet.

However, there are daily decisions that can be important and some that may change your life. So, how do you make the choice and decide? Other people may provide input, but the ultimate choice of what you will do with the information is up to you, and you alone are responsible for making the best choice. The problem solving steps will help you make those choices in a more logical manner so that your solutions will not create larger problems than the ones you were trying to solve.

OBJECTIVE 8

List characteristics of a good employee. (Activity Sheet 5)

Responsibility is the act of being reliable and trustworthy with tasks or items you are accountable for. As you go out on the job, you will encounter many situations that will require you to be accountable for your skill in relating to others. Your ability to carry out your responsibilities in a positive way will get the task or goal accomplished and will further good human relations with your employer, co-workers and customers.

Employers are looking for employees with good human relations skills and who exhibit the following characteristics:

- **Cooperation**—Helping others when needed.

  EXAMPLE: Helping other employees when your duties are completed; seeing things that need to be done and doing them.

- **Initiative**—Taking it upon oneself to move on to additional duties which require more responsibility and more difficult skills.

- **Honesty**—Being trustworthy with money, merchandise, tools and your time on the job.

  EXAMPLE: Starting work on time; returning from breaks and lunch on time; being productive while at work; not leaving work a few minutes early; not taking pens, paper and tools for personal use; not stealing money or merchandise; not giving special favors or discounts to friends and relatives.

- **Willingness to learn**—Being flexible enough to be willing to try new methods to get the job done more efficiently.

- **Following directions**—Comprehending written and oral directions to complete a task. Listening closely to what is being said and reading directions before starting a task.

- **Neat appearance**—Good grooming and personal hygiene. If a person is well groomed he or she is more pleasant to work around and customers are more likely to ask for assistance.

- **Patience**—Not losing one's temper in difficult situations.

- **Leaving personal problems at home**—You are not being paid to solve personal problems during work hours.

- **Punctuality**—Being on time so that you can get in a full day's work.

- **Good attendance**—Being at work or at school every day you are supposed to be there. Excessive absences from work can result in being terminated.

- **Dependability**—Completing a task on time and doing what you say you will do when it is supposed to be done.

- **Enthusiasm**—Creating an air of excitement and putting forth extra energy to complete a task. This will often motivate others to work faster and get more excited about their tasks which will result in an energized atmosphere.

- **Accepting criticism well**—Being able to respond positively to suggestions from supervisors on ways to improve task. If a person realizes that the supervisor is constructively criticizing their performance and not them as an individual, they can change their work habits and not feel threatened. Do not make excuses, but look the supervisor in the face and try not to look hurt, sulky, or mad.

- **Loyalty**—Keeping confidential matters, such as price margins and cost codes to yourself; not participating in gossip and disputes; not criticizing the business to outsiders; being a good customer of your business's products and service where applicable.

- **Sense of humor**—Being able to see the humorous side of an incident. Being able to laugh, especially when the joke is on you, helps gain the acceptance of co-workers.

- **Positive attitude**—Look for what is good and right about something or someone. Try not to complain or focus on what is unpleasant. Avoid complaining and using words such as "can't," "won't," or "don't." Look for solutions. Act happy and enthusiastic and you will be happy and enthusiastic because actions occur before feelings. Do not permit co-workers or supervisors who have negative attitudes to trap you into their way of thinking.

- **Tactfulness**—Being able to tell someone he or she needs to improve in his or her performance, appearance, or attitude in a way that does not offend the person, but will encourage a sincere de[illegible]change.

- **Interest in the job**—Learn as much as you can about your job and continue seeking more skills and knowledge that will help you keep up to date on the new technology and laws that affect your business. The more you learn about your job, the more interested you will become in your job and the more qualified you will become on the job. When you are interested in the job you do, you enjoy going to work every day.

As you acquire all the above characteristics, you will most likely advance in your job and enjoy your work more. Getting along with others is an essential part of all jobs. Getting along with others is as much a skill as knowing how to operate a piece of equipment or carry out a task.

Work to improve your human relations skills and you will reap the benefits of working your way into a secure job. Remember, no one owes you a job; you have to earn it by your performance on the job.

OBJECTIVE 9

Identify ways an employee can get along with co-workers, employers and customers. (Activity Sheets 6 and 7)

Sometimes on our jobs we are confronted with situations in which we are required to respond to our co-workers, our supervisor, employer or customers statements, actions or advances. To handle these types of problems, there are several actions that we can take to help us get along better with others.

Some suggestions for getting along with a supervisor include:

- Accept the authority of the supervisor to have things done his or her way.
- Immediately ask the supervisor for more responsibility when all assigned duties are completed.
- Do not flirt with anyone while on the job.
- Handle merchandise and supplies respectfully - they represent an investment to the business. Soiled or wrinkled merchandise and careless use of supplies and equipment quickly cut into profits.
- Do not pretend to know all about the business - young, new employees who appear to think they know all there is to know are considered "smart-alecky" and may not last long on a job.
- Learn from all supervisors, both the good ones and those less skilled. Realize that supervisors give constructive criticism in either a positive or negative manner. Whether the constructive criticism by a supervisor is negative or positive, an employee must learn to listen to what is being said about ways to correct their job performance and not let the manner in which they are being told overshadow the message of the supervisor.

Some of the ways you can improve your relationships with your co-workers are to:

- Know all co-workers by name - everyone likes to hear their own name.
- Introduce yourself to the other employees if the supervisor or another employee does not do so - put your best foot forward to become acquainted with the others you work with.
- Greet by name or at least smile at the other employees upon arriving at work.

342

- Say good-bye, nod your head, or wave to co-workers when leaving work for the day.
- Listen, ask questions, and thank the other employees who try to be helpful.
- Realize that new, young employees may not be able to get by with as much as older, trusted employees.

Other ways to get along with co-workers are:

- Watch what you say; always say less than you think.
- Make promises sparingly and keep them faithfully, no matter what it costs.
- Never let an opportunity pass to say a kind and encouraging word to or about somebody.
- Be interested in others.
- Be cheerful.
- Retain an open mind on all debatable questions.
- Let your virtues speak for themselves, and do not talk of others' vices.
- Be careful of others' feelings.
- Pay no attention to ill-natured remarks about you.
- Don't be too anxious about getting praise.

In order to greet the customers or clients at your business establishment and make them feel welcome, you should learn the best way to make them feel special so they will want to return to your business in the future. You are the ambassador for your business, and the customers will form an opinion about the service your business offers by the way you provide them with help and information in a courteous, mannerly way. Following is a list of suggestions to make your customers feel welcome:

- Smile and greet each customer with whom you come in contact.
- Try to remember the customer's name.
- Approach customers promptly and with confidence and sincerity.

- Treat each customer as a guest; the customer is your reason for being in business.

- Help each customer with individual needs - customers come to a business because they need the goods or services you provide. Sometimes they don't even know what their needs are and you must help define these needs first.

- Realize that there will be some difficult customers.

- Always be polite, tactful, and honest with customers - if you are in a selling situation, stay busy within viewing-distance to the "just-looking" customer. This way, if the customer sees something interesting, you may be of service without appearing to be pushy.

- Never argue with a customer, you may be right, but if the customer feels alienated, he or she may never return. You may be able to make your point but lose a customer in the meantime.

If you do get a customer or co-worker who is unpleasant to be around, there are certain methods you can use to make the situation more bearable. The following is a list of difficult types of people and how to respond to them.

- **Flirt**—Ignore them and fail to react. Be casual and don't provoke attention by wearing suggestive clothing or making suggestive remarks. The ignoring method will work in the majority of cases, but if the advances become serious and frequent, more drastic action may need to be taken.

- **Grouch**—Be pleasant and sympathetic, not taking the grumbling and griping personally. Realize that there may be reasons for crankiness, such as home life, financial problems, and personal dissatisfaction.

- **Bossy person**—Avoid conflict with a person who is not your supervisor, but who insists on giving you orders, until you can discuss the matter with your supervisor. Pay attention to details and follow directions as accurately as you can if your supervisor or a person who greatly influences your supervisor gives you instructions, criticism or orders.

- **Complainer**—Politely avoid complaining as much as possible because it is contagious. Counteract complaints with cheerful, positive statements.

- **Tattler**—Politely but firmly refuse to listen to gossip by suddenly remembering something you have to do and politely dismissing yourself.

There are three types of behavior we display in certain situations when reacting to others. At different times, any one of these three different behaviors may be the correct behavior depending on the situation.

- **Passive**—Submitting to or yielding to someone in authority. For example, when a supervisor is explaining how to operate a piece of equipment.
- **Assertive**—To act positively, to affirm or declare. To be sure about your actions and knowledge so you can express your ideas in contributing to finding solutions to a problem.
- **Aggressive**—An unprovoked attack or focusing in on making a change in procedures, goals or other area you feel very strongly about.

Criticism is the act of judging merit through a spoken or written judgement concerning some matter resting on opinion. For example, supervisors have to evaluate the quality of a task performed by an employee. After they have evaluated the task performed, they need to let the employee know whether it is satisfactory or unsatisfactory. If the task is unsatisfactory, they can use one of the following methods to tell the employee he or she needs to change the method of doing that task.

- **Negative criticism**—Brings out all the errors and mistakes that a person has made and attacks the self-esteem of an individual.

  EXAMPLE: "Bill, can't you do anything right! I told you to proof all your Lab Reports so I don't have to correct your mistakes! Where did you learn to read anyway! This report has two errors that you have to correct!"

- **Positive reinforcement**—Employee management technique based on positive rewards such as praise, recognition or merit given for the things that have been done correctly and then pointing out mistakes that need correcting.

  EXAMPLE: "Bill, you have been preparing a lot of Lab Reports lately, and you have done a good job on the format for these reports, but today you let a couple of typographical errors slip by you. I have marked them on the report, and could you please get it corrected for me right away so I can sign it before I leave?"

- **Constructive criticism**—Useful or helpful corrective judgments or statements made by a supervisor designed to tactfully correct mistakes a person is making. The statements are directed at the task that needs improvement, not at the individual. It lets the employee know he or she has to improve skills or behavior and tells the employee how to improve without destroying the person's self-concept.

  EXAMPLE: "Bill, I noticed that lately you have been having a little bit of a problem with proofing the reports you have prepared. Sometimes it helps me to use a ruler to underline each line as I read it for errors, so that I can focus my attention to just one line at a time. If that doesn't seem to help, I have a book in my office that has some other suggestions for accurate proof-reading that I will loan you if you would like to look at it. I have circled the two errors in this report that need to be corrected so I can sign them before I leave."

OBJECTIVE 10

List benefits of setting goals. (Activity Sheet 8)

When starting out on a long trip, we get out the road map, determine what our destination is going to be, and then plan a route to travel. Some of the facts we consider when planning our route might be the amount of time we have to make the trip; the amount of money we have to spend; the purpose of the trip - business or vacation; whether we are wanting to do any sight-seeing; how many people will be going with us; and what type of transportation we are going to use.

All of these factors must be considered in order to be able to reach our destination or goal. If we just start out driving, not knowing where we are going, how much we have to spend, or any of the other facts we need, how will we know whether or not we have reached our goal? We will just be drifting along; moving, but not really going anywhere.

In life we have to learn to set goals for ourselves so that we will not just drift along not really knowing where we are going or what we want to do with our lives. Just as there are many facts to consider in taking a trip in order to reach our destination, there are many things to be considered when setting goals for ourselves.

A **goal** is a specific objective or outcome which can be measured to determine whether or not we have achieved or reached it. On a trip, we know whether or not we reach our destination when we drive into the town we planned to visit. There are many obstacles that we could run into traveling from one place to our destination. We could have car trouble, which would have to be fixed before we could continue. We could be in an accident, which would detain us for some time. The gas stations could be out of gasoline, or we could get stopped for speeding and have to pay a large traffic ticket and not have enough money to continue. These obstacles could slow us down. Depending on the size of the obstacle or problem, we solve it or cope with it and proceed on our way because we know where we are going.

In order to know where we are going with our lives, we must take a little time to gather the facts about ourselves and determine what route we want to travel with our lives. To do this, we need to learn to set goals. Before we set goals, we must be able to evaluate ourselves and our abilities to determine whether or not we will be able to accomplish the goals we set for ourselves.

It would be very difficult for someone who could not read or write to set the goal of becoming a veterinarian. However, it is not impossible. In order to reach that goal, the individual would have to learn to read, write, solve problems and have the finances to pay for their education. They would also have to be very committed to becoming a veterinarian because it would take years to accomplish their goal.

Goals require perseverance and the ability to not become discouraged easily. In order to achieve a large goal, a person must be able to learn to set **short-term goals, intermediate goals and long-term goals. Short-term goals** could be set on a day-to-day or week-to-week basis, such as getting up in the morning, getting to school or work on time, or finishing homework every night before doing something else. When you have arrived at work early or finished your homework, you know you have achieved that short-term goal.

An **intermediate goal** can be made up of many short-term goals and extends over a longer period of time. For example, an individual can set a goal for themselves of making the honor roll for a semester. In order to reach that goal, they must set many short-term goals of getting all their assignments completed and turned in and spending time studying for the tests.

Their **long-term goal** could be to graduate from high school or college with a specific grade point average. In order to achieve that, they must set short-term and intermediate goals for themselves. To reach the long-term goal, they may have to overcome obstacles, cope with problems and adjust time frames, but if they can keep the long-term goal in their minds, they will be able to deal with the problems that crop up along the way.

Some of the benefits of setting goals are:

- Give direction and purpose to actions.
- Let a person know when success is achieved.
- Help bring about desired conditions.
- Create self-confidence by allowing a person to experience a series of small successes.

Honestly evaluate yourself and learn to set goals so that you will not just drift through life. Goals can give you purpose and direction and help you become what you want to become as an individual and help you chart your own course. You are the captain of your ship called "life" and the direction you sail and the destinations or goals you reach are the rewards or consequences of your planning and actions.

OBJECTIVE 11

Discuss time wasters and how time can be managed more efficiently.

NOTE: Many things influence how people choose to spend their time. Some factors include one's goals, values, and standards, and one's responsibilities in life.

- Procrastination is probably the most well-known way to waste time. However, other time wasters include
  - Lack of planning
  - Lack of goals or objectives
  - Lack of priorities
  - Overcommitment
  - Crisis situations

348

- Haste, indecision
- Distractions

NOTE: Any decision is usually better than none at all. If the decision is a wrong one, at least some action was taken which can be evaluated and modified.

- You can manage your time more efficiently by setting goals and priorities. Then, make a realistic time plan based on your priorities.

NOTE: Make a daily "To Do" list and follow it. Set interim deadlines if they will help reach your main deadlines.

- Be decisive and offer yourself an incentive for following your time plan and do the hardest tasks at the times you work best.

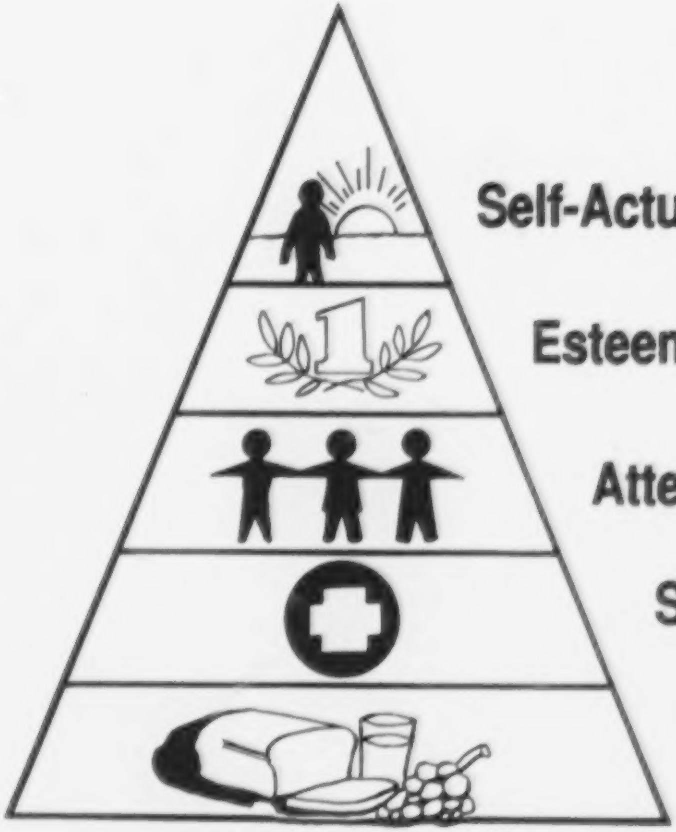
EXAMPLE: If you are a "morning person," do your hardest tasks in the morning. You will be relieved that they are completed (or started) and you can save the easiest tasks for the afternoon or evening.

- Evaluate regularly your use of time. Is it helping you to reach your goals?

OBJECTIVE 12 **List guidelines for making a written time plan.**

- Keep plan simple.
- Make your list complete.
- Keep plans flexible.
- Make plan workable.

Maslow's Hierarchy of Basic Needs



Self-Actualization

Esteem - Self Respect

Attention - Social Activity

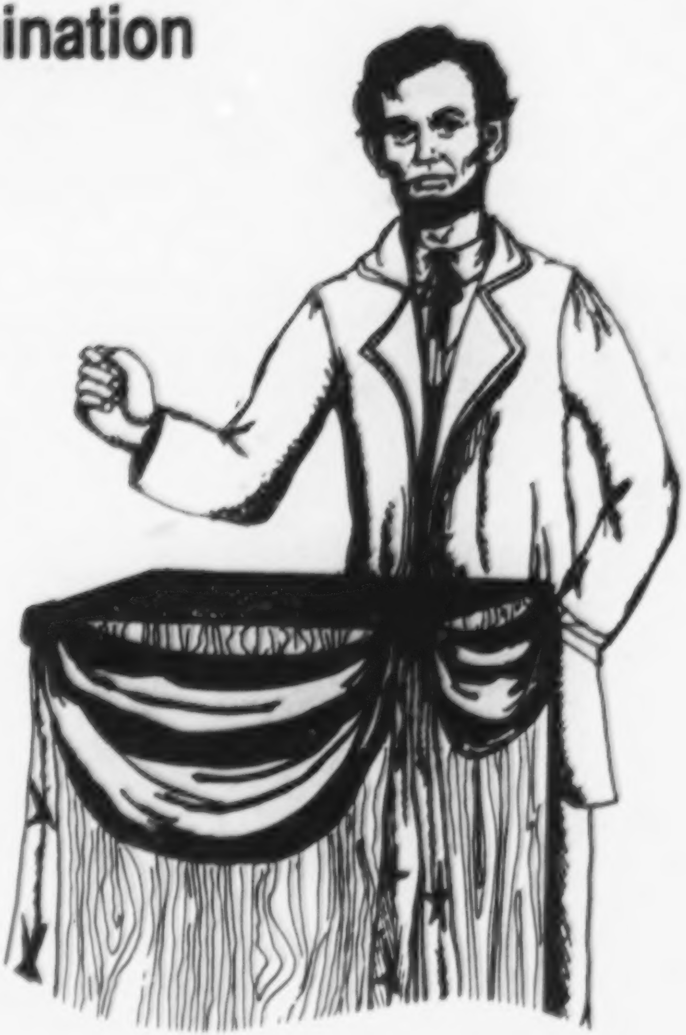
Safety

Basic
Physiological Needs

To Handle a Problem...

1. RECOGNIZE THE PROBLEM
2. GET THE FACTS
3. WEIGH THE FACTS
4. DETERMINE THE OBJECTIVE
5. MAKE A DECISION
6. TAKE ACTION
7. CHECK RESULTS

Determination



Finally......Success

Failed in Business, 1831
Defeated in Legislature, 1832
Again Failed in Business, 1833

Elected to Legislature, 1834

Nervous Breakdown, 1836
Defeated for Speaker, 1838
Defeated for Elector, 1840
Defeated for Congress, 1843

Elected to Congress, 1846

Defeated for Congress, 1848
Defeated for Senate, 1855
Defeated for Vice-President, 1856
Defeated for Senate, 1858

Elected President of United States, 1860

Lincoln's Record

ACTIVITY SHEET 1 | **USING HUMAN RELATIONS SKILLS** **V**

RATE PERSONALITY AND DEVELOP A PERSONALITY SELF-IMPROVEMENT PLAN

Part I

DIRECTIONS Rate yourself on each of the following traits by placing an "X" in the column which best describes you.

NOTE: Be as sincere as possible when completing this activity sheet so that you may pinpoint areas of your personality that may need improvement.

TRAIT	VERY GOOD	ABOVE AVERAGE	AVERAGE	BELOW AVERAGE	POOR
1. Facial expression	____	____	____	____	____
2. Grooming and wardrobe habits	____	____	____	____	____
3. Mannerisms	____	____	____	____	____
4. Speech	____	____	____	____	____
5. Bodily movements	____	____	____	____	____
6. Intelligence	____	____	____	____	____
7. Initiative	____	____	____	____	____
8. Dependability	____	____	____	____	____
9. Enthusiasm	____	____	____	____	____
10. Sincere interest in others	____	____	____	____	____
11. Honesty	____	____	____	____	____
12. Courtesy	____	____	____	____	____
13. Manners	____	____	____	____	____
14. Respect for others	____	____	____	____	____
15. Emotional control	____	____	____	____	____

TRAIT	VERY GOOD	ABOVE AVERAGE	AVERAGE	BELOW AVERAGE	POOR
16. Self-confidence	____	____	____	____	____
17. Integrity	____	____	____	____	____
18. Loyalty	____	____	____	____	____
19. Desire to work	____	____	____	____	____
20. Acceptance of change	____	____	____	____	____
21. Ability to decide	____	____	____	____	____
22. Ability to accept criticism	____	____	____	____	____
23. Tactfulness	____	____	____	____	____
24. Alertness	____	____	____	____	____
25. Flexibility	____	____	____	____	____

Part II

DIRECTIONS

Answer questions 1-3, and develop a self-improvement plan to change negative personality traits to positive traits.

1. List the negative personality traits which were pinpointed in Part I of Activity Sheet 1.

____

____

2. Briefly explain why you rated yourself negatively on these traits.

____

____

3. What do you admire about individuals who display these same traits in a positive manner?

____

____

4. Review the answers given above and briefly state your plan of action to improve your negative traits.

____

____

EXAMPLE: If facial expression is a negative trait, the plan of action might be to smile more often to keep from frowning or scowling.

ACTIVITY SHEET 2 | **USING HUMAN RELATIONS SKILLS** **V**

ANALYZE YOURSELF

DIRECTIONS

Answer the following questions honestly as they apply to your job and/or classroom experiences by checking the most appropriate column. Then analyze the statements checked "Sometimes" and "Never."

	Never	Sometimes	Always
1. Are you able to act naturally under all circumstances?	____	____	____
2. Do you seek opportunities to meet those in positions of authority?	____	____	____
3. Do you avoid criticizing others?	____	____	____
4. Are you able to give credit to others for what they do, rather than seek first to obtain credit yourself?	____	____	____
5. Do you try to have a positive attitude?	____	____	____
6. Do you approach your work confidently?	____	____	____
7. Do you try to improve your attitudes?	____	____	____
8. When you fail, do you come right back?	____	____	____
9. Do you treat customers and co-workers as though they are important?	____	____	____
10. Do you expect to succeed?	____	____	____
11. Are you honest?	____	____	____
12. Are you willing to accept more responsibility on your job?	____	____	____
13. Are you free from bad habits which will hinder your progress?	____	____	____
14. Do you discharge your duties promptly and efficiently and with little or no supervision?	____	____	____

	Never	Sometimes	Always
15. Do you finish the things you start?			
16. Do you feel your present job can help you in your future career?			
17. Do you try to appreciate, understand, and show a sincere interest in customers and co-workers?			
18. Do you try to learn as much as you can at work?			
19. At work, do you try to be a real service to the people on the job?			
20. Do you try to improve your memory of prices, procedures, stock locations, delivery dates, and customers' preferences?			
21. Do you work to be free from superstitions and prejudices?			
22. Do you listen attentively to what people say without interrupting them?			
23. Do you observe closely what is going on around you and understand the significance of it?			
24. By reading and studying, do you keep informed about current events, your work, your future career, and subjects of popular interest?			
25. Can you be depended upon to keep your promises to customers and co-workers?			
26. Do you defend from unjust criticism the persons and things (company, co-workers, merchandise) with which you are identified?			
27. Do you work toward your goals?			
28. Do you believe we become what we think about, what we concentrate on achieving?			
29. Do you believe the most useful goals are specific goals?			

	Never	**Sometimes**	**Always**
30. Do you control your temper?			
31. Do you often feel enthusiastic about something you wish to do?			
32. Are you able to make decisions about everyday things easily?			
33. Are you able to interest yourself in the details of your job?			
34. Are you careful to look on the bright side of situations?			
35. Are you able to work pleasantly with others?			
36. Do you believe that we receive rewards by giving service to others?			
37. Do you try to find ways to help other people at work?			
38. Do you believe it is important for a person in business to be civic-minded?			
39. Do you try to be cooperative?			
40. Do you avoid carrying tales and gossiping about others?			
41. Do you try to see the other person's point of view?			
42. Do you avoid arguments?			
43. Do you avoid making fun of others?			
44. Do you keep out of other people's business?			
45. Do you avoid finding fault with everyday little things?			
46. Do you keep your personal troubles to yourself on the job?			
47. Do you feel honesty is the way to success?			
48. Do you really enjoy your work?			
49. When you feel "down" do you try to work harder?			

	Never	Sometimes	Always
50. Do you think about others on special occasions, such as their birthdays and in sorrow and happiness, and do you send them some expression of your thoughts?			
51. Do you congratulate your friends upon their achievements?			
52. Do you learn, remember, and use the names of the people you meet?			
53. Do you know the rules of etiquette and observe them?			
54. Do you think about the rights of others before you think of your own?			
55. Do you show respect for everyone regardless of position?			
56. Are you appreciative for everything someone does for you and always thank them?			
57. Do you try to improve?			
58. Do you want to be like your present friends?			
59. Do your friends try to operate at their best potential?			
60. Do you realize how much your friends influence your achievements?			
61. Are you well-groomed?			
62. Do you smile often?			
63. Do you really know that you are a unique and valuable person?			
64. Do you think about exciting possibilities in your future work?			
65. Do you try to improve your human relations skills?			
66. Do you feel you are mature in your attitudes, outlook, and actions?			
67. Do you try to see yourself as others see you?			

	Never	Sometimes	Always
68. Do you feel you could increase your productivity at work?	____	____	____
69. Do you believe how much money we earn is determined by how hard it would be to replace us?	____	____	____
70. Do you try to make every day count?	____	____	____
71. Do you try to plan your time wisely?	____	____	____
72. When there is a problem at work or at school, do you try to be part of the solution?	____	____	____
73. Are you patient with others?	____	____	____
74. Do you feel you will be rewarded in some way if you do well at work or at school?	____	____	____
75. Do you refrain from exaggeration?	____	____	____
76. Do you avoid flattering people for personal gain?	____	____	____
77. Do you avoid embarrassing others?	____	____	____
78. Do you return what you borrow to its proper place?	____	____	____
79. Do you accept at least partial blame for failures?	____	____	____
80. Do you respect your parents, elders, employers, and people in authority?	____	____	____
81. Do you believe that successful people frequently ask themselves, "How can I give more service to others?"	____	____	____

PLAN A SELF-IMPROVEMENT PROGRAM

DIRECTIONS

Use the following outline to plan your self-improvement program. Use a separate sheet of paper.

I. Physical Characteristics
  A. Going for me
  B. Disadvantages
  C. What can I change
II. Needs - which attained/need to be attained
  A. Physiological
  B. Safety and security
  C. Attention
  D. Esteem and self-respect
  E. Self-actualization
III. Attitudes
  A. To encourage
  B. To change
IV. Aptitudes
  A. Skills
  B. Learning
V. Interests
  A. Have now
  B. Should develop
VI. Selected career
  A. Where to research careers
  B. Correlate choices with aptitudes and attitudes
  C. Possible choices

VII. Requisites for career
    A. Training
    B. Human relations skills I need
VIII. My qualifications for career
    A. Training
    B. Human relations skills I have
IX. Areas to improve
    A. Training
    B. Human relations skills

DETERMINE SOLUTIONS TO PROBLEMS

1. Bob has just graduated from high school. He is sharp and definitely college material. For the last two years of high school he had to work to help support his widowed mother and three younger sisters.

   He received a scholarship that covered tuition and books but not room and board. His boss offered him a small raise, or he would write a recommendation to get him a comparable job with comparable pay with the same company in the town where the university was located.

   With a college education Bob would qualify for a much better position in the long run; however, there would only be enough money to support himself. What should Bob do?

   Problem? ____________________

   ____

   Facts? ____________________

   ____

   Weigh? ____________________

   ____

   Objective? ____________________

   ____

   Decision? ____________________

   ____

   Action ____________________

   ____

   Possible results ____________________

   ____

2. Mary is the daughter of a minister. She has always tried to practice the value of honesty and integrity her parents taught her. She has been nominated as outstanding student of the year based on character, personality, and achievement. Her only real competition is Ann, a girl whom Mary had seen cheating on a test. Ann had also signed her mother's signature on an absentee form so her mother would not know she had skipped school. Only Mary had seen her do this. If Mary told, Ann would be eliminated. Mary might win anyway. What should Mary do?

   Problem? ______________________________

   ____

   Facts? ______________________________

   ____

   Weigh? ______________________________

   ____

   Objective? ______________________________

   ____

   Decision? ______________________________

   ____

   Action ______________________________

   ____

   Possible results ______________________________

   ____

3. Barbara was in two classes with Juan. They frequently walked to class and worked on assignments together and became good friends. Juan asked Barbara to go to the FFA banquet and dance with him next month. She accepted. When she told her parents they said they did not approve because Juan was Hispanic. Barbara said she had already given her word and refused to hurt Juan's feelings. Barbara's parents said that as long as she was determined to go they would not pay for a dress or shoes. Barbara had no money of her own. What could she do?

   Problem? ______________________________

   ____

Facts? ____

Weigh? ____

Objective? ____

Decision? ____

Action ____

Possible results ____

ACTIVITY SHEET 5

USING HUMAN RELATIONS SKILLS

V

DISCUSS RESPONSIBILITIES TOWARD A JOB

DIRECTIONS

Read each of the following case study problems and decide which responsibilities could have been solved or avoided.

This assignment may be done by an individual or by small groups. The individual or a group leader should lead the class discussion on possible solutions. Share with the class any personal experiences or observations of broken work rules that have caused problems on a job.

NOTE: The case studies can also be used for role playing a discussion between a supervisor and student-trainee.

1. Roger Fads works for a manufacturer of building and home improvement supplies. Because he often must do heavy, dirty work, it is not necessary for him to wear dress clothes. Therefore, he usually wears his old jeans with the knees worn out and one of his t-shirts with a picture of a marijuana leaf or a wine bottle. What responsibilities apply in this situation?

2. Bertha Breaks works in small western store with only one other employee. As soon as Bertha arrives at work the other employee can go on a break and then do some bookkeeping duties which cannot be done until someone comes to help the customers.

   However, because Bertha has such little time between school and work she asked if she could also have a break. Also, Bertha's mother now calls frequently to give her a short shopping list to fill during her break, and Bertha sometimes calls her mother to ask about borrowing the family car after work. What responsibilities are involved in this situation?

3. Lawanda Late works at a veterinary hospital. She is an excellent employee except for one problem. Lawanda has difficulty getting to work on time on Saturday morning after a late date on Friday night. She just doesn't hear her alarm go off; she has also left work early several afternoons. Her teacher-coordinator talked to her training station sponsor. What responsibilities do you suppose the teacher-coordinator discussed with Lawanda?

4. Stanley Stand just got fired. His explanation is the following: "The boss seemed to have a good reason for cutting back on the number of employees at this time, but I think he really just doesn't like me. The boss mentioned once that I didn't seem interested in the job. Heck, I'm going to be a lawyer. I just want to work in a western clothing store to get through college. I don't need to know how to do all that stuff in the store. Besides, the boss always got mad if I just stood around a minute. He and the other employees are always standing around talking to each other when there aren't customers in the store. They expected me to do my work and their work too, especially if it was dirty work." Stanley does not seem to be aware of which responsibility?

5. Sticky-Fingers Sally had been observed using the office's postage stamps for personal letters. Her employer ended up firing Sally. Was the employer justified in letting Sally go? Will Sally fully understand why she was dismissed without an understanding of the responsibilities?

6. Patty Perfume works in a farm equipment supply store. Several other employees have complained that her cologne is too strong. One is allergic to it and has frequent sneezing fits. Is Patty's heavy use of cologne a violation of basic responsibilities?

EVALUATE HOW TO GET ALONG WITH OTHERS

DIRECTIONS

A successful person should know how to get along with others. By the results of this self-test, you will see how you are doing. Circle your answers.

1. You meet a person you immediately do not like. You would:
    a. Try to find a topic of conversation of common interest.
    b. Avoid the person.
    c. Try to put the person in his or her place.
2. You are offered a job for which you are not fitted. You would:
    a. Admit your inadequacy and offer to learn on the job.
    b. Refuse to try.
    c. Try to bluff through it.
3. When dealing with people, such as sales representatives or waitresses, you:
    a. Usually smile and say something pleasant.
    b. Are nice if they are pleasant to you.
    c. Treat them impersonally.
4. You have been overcharged or undercharged in a business transaction. You would:
    a. Ask the person to recheck the bill.
    b. Pay the bill without saying anything.
    c. Tell the person they have cheated you.
5. When you meet a person who is handicapped, you:
    a. Treat the person as you would anyone else.
    b. Go out of you way to be especially nice.
    c. Try to avoid the person.

6. A friend has just bought an outfit which you think is unbecoming. They ask if you like it. You would say:
    a. "Yes, I like the color. What would you think about changing the length of the pants?"
    b. "How's the weather today?"
    c. "It looks terrible."
7. You honestly feel that you:
    a. Are interested in most people.
    b. Are only really comfortable with your own clique.
    c. Are bored with most people.
8. In a store you are in no hurry, but the person after you is rushed. You:
    a. Suggest that the person go ahead of you.
    b. Make your selection because it is your turn.
    c. Take an extra long time just to calm him or her down.
9. When you meet people of different races or religions, you:
    a. Consider them as human beings like yourself.
    b. Have a secret feeling of fear.
    c. Are convinced your way of life is superior.
10. After a picnic you find there is no trash basket. You would:
    a. Take the papers, bottle, and food home with you.
    b. Try to hide the trash on the property.
    c. Leave it on the ground.

Scoring

Give yourself 5 points for every "a" answer, 3 points for ever "b" answer and no points for "c" answers. Add up your score.

Analysis

35 to 50 points: You are very good in your relationships with others because you respect others and greet them with interest and courtesy. You are liked by your friends and those with whom ou deal in a casual way.

18 to 34 points: You do very well with others most of the time, but you are sometimes self-centered and forget to put yourself in the other person's shoes. Try working toward more of those "a" answers, and you will find that living is more pleasant than it is now.

0 to 17 points: You are having trouble either because you are too shy or too aggressive. You know which! Good human relationships are like anything else in life; they take practice. Select someone you admire. Analyze his or her actions; then adapt those traits to your personality.

INTERPRET HOW TO REASONABLY DISAGREE

DIRECTIONS Can you solve the following problems with no one involved losing face?

Part I

1. You are an employee in a hardware store. A customer returns a drill purchased on sale. Signs all over the store say, "All sales final." He says it is the wrong size and he wants to exchange it. You remind him that you cannot exchange it because the one he wants is not on sale. He starts to get angry. How might you resolve this so you do not lose a customer?

2. A young married couple are furnishing a new country home. The husband's aunt gave them a coffee table that is too large, doesn't fit in with the decor, and is ugly. The wife doesn't want it. Because the aunt is coming to visit, the husband insists it must be where the aunt can see it is being used. The wife says she goes or the table goes. How can this be solved reasonably?

3. An efficient secretary is blamed for some missing papers. The boss is in a hurry and is cross. It turns out a typist in the office had misplaced them. The boss apologizes but indicates to the secretary that this should have never happened. The secretary is angry because the secretary is very conscientious and felt wronged. How can this be resolved reasonably?

____

____

____

____

Part II

DIRECTIONS

In the workplace today there are many complex tasks that an employee must be able to learn on the job. During this learning and growing process, you must be able to recognize negative and positive criticism in order that you may be able to resolve conflicts. Look at the case studies below and answer the questions.

1. Craig was a new employee at the local vet hospital. One of his duties was to mop the floor every night after the office had closed. The morning supervisor told the afternoon supervisor that his new employee, Craig, was lazy because the corners of the floor were not being mopped. The evening supervisor confronted Craig and repeated what the morning supervisor had said about his being lazy.

   Was the criticism ______ negative? ______ positive?

   How would you have handled it?

   ____

   ____

   ____

   ____

2. Sarah and Jane were co-workers in an agriculture supply store and they were each assigned two display windows to plan and set-up. After the windows were completed, a fellow employee stood back and complimented both girls on the selection of merchandise they had chosen to display. Sarah's display was arranged poorly and needed some changes to create a more attractive balance. The fellow worker stated, "Sarah, the merchandise you have selected makes a statement to the customers, but the items are so closely grouped together they tend to hide the good features."

   Was the criticism _____ negative? _____ positive?

   How would you have handled it?

CHART GOALS, INCLUDING A TIME PLAN TO ACHIEVE THEM

DIRECTIONS

These may be tentative or definite. Underline those you think of as definite.

Part I

GOALS

Short Term (Today, this week or this month)

Intermediate (This semester or this year)

Long Term

Next year

Two Years

Five Years

Ten Years

- Think about the goals you have written above and how they fit together. Try to select the goal that seems most important to you now and work it out in more detail by completing the following statements.

  a. One big goal that I really want to accomplish is

  ____

  ____

  b. Here is how I am going to make progress toward this goal

  ____

  ____

  c. My deadline to turn this plan into reality is

  ____

  ____

d. Here are abilities and skills that I have that will help me to achieve this goal

e. I have detailed knowledge of the following subjects that will help me reach my goal

f. Here are areas in which I need more information, help, skill, and knowledge

g. Here are places to go and people to see to gain knowledge, acquire information and master skills

h. Here is the first step I am going to take (this week!)

i. My next three main steps will be as follows:

1) ______

2) ______

3) ______

j. My deadline for completing these three steps is

Part II

DIRECTIONS

Write a short autobiography. Use this outline to guide you. Use complete sentences and be neat with your work.

I. Early life

   A. Where and when born

   B. Earliest remembrances

   C. Early experiences

II. Family

   A. Size of family

   B. Number of brothers and sisters

   C. Favorite family past-time

III. Friends

   A. Who they are

   B. Things we do together

IV. School experiences

   A. Early school life (1 through 5)

   B. Recent school experience (5 through)

V. Likes and dislikes

   A. Likes

   B. Dislikes

VI. Goals for the future

   A. Educational

   B. Occupational

   C. Other

ASSIGNMENT SHEET 1

USING HUMAN RELATIONS SKILLS

NAME ______________________________ SCORE ________

OBJECTIVE 13 **Recognize levels of human needs.**

DIRECTIONS Read the following situations and based on Maslow's Hierarchy of Needs, answer the questions about the level of human needs.

1. Sharon does not eat breakfast. She sometimes has trouble paying attention in class. All she can think of is going to lunch. What level of human need is working here?

   ____

2. The union went on strike for safer working conditions and a better insurance program even though they make high wages. What level of human need is working here?

   ____

3. Anthony stayed up late last night and feels like he is now getting a headache or cold. What level of human need is working here?

   ____

4. Art just joined the bowling team at work. What level of human need was met here?

   ____

5. Bill's Co-op gives an employee of the month award. What level of human need is this business attempting to meet?

   ____

6. Jerry and Juanita own a small agribusiness. They have a picnic and softball tournament each spring for their employees and their families. What level of human need are they attempting to meet?

   ____

7. David bought an electric clipper from Mary's Pet Shop. Mary offers her personal guarantee that she will replace or repair all grooming aids that break during the first year of use. What level of human need is being met here?

____

8. Nancy, Terry, and Helen ate pizza late last night and now have stomach aches. What level of human need is preventing them from doing their work?

____

9. Beth is retiring next month. She feels that she has had and will continue to have a good, well-rounded life. She is healthy, financially secure, still interested in learning new things, has a happy family, is active in her church and clubs, and just received the award for being an outstanding manager in her company. What level of human needs has Beth reached?

____

10. Bennie is a supervisor at the local tractor dealership. He has two employees, Francis and Lewis, who did an excellent job last week. Consequently, Bennie made a special effort to tell them what a good job they are doing. To what level of human need was Bennie appealing?

____

11. Harry really doesn't like himself. Consequently, he is constantly attracting attention to himself. He has needs at what level?

____

USING HUMAN RELATIONS SKILLS

ASSIGNMENT SHEET 1

1. Physiological
2. Safety
3. Physiological
4. Attention/esteem
5. Esteem
6. Attention
7. Safety
8. Physiological
9. Self-actualization
10. Esteem/attention
11. Attention

WRITTEN TEST

USING HUMAN RELATIONS SKILLS

V

OBJECTIVE 1

Match terms associated with human relations to their correct definitions. Write the correct letters in the blanks.

____ 1. Behavior used to cope with difficulties

____ 2. Recognizing the worth of self and worth of other people, their property, and opinions

____ 3. Making progress toward achieving a worthy goal

____ 4. Feeling or emotion

____ 5. All the physical, mental and emotional characteristics that make up a whole person

____ 6. Attitudes, judgments, or opinions formed before the facts are known

____ 7. How people feel about themselves

____ 8. Race or group of people with similar customs

____ 9. Potential or knack for having; a natural ability a family trait, innate

____ 10. Interaction between people and learning to accept them as they are

____ 11. Atmosphere or feeling prevailing in a workplace, home, school, or other type of living environment

____ 12. A skill that has been developed

____ 13. Person in power or one who gives commands

____ 14. Activities a person enjoys doing most

____ 15. To stimulate an interest in work through meeting needs and appealing to employee's interests

____ 16. The ideas, relationships, and other matters that a person believes to be important.

a. Human relations

b. Personality

c. Respect

d. Success

e. Adaptability

f. Ethnic group

g. Prejudice

h. Defense mechanism

i. Responsibility

j. Self-concept

k. Ability

l. Aptitude

m. Morale

n. Attitude

o. Authority figure

p. Values

q. Motivate

r. Interests

s. Determination

t. Power

u. Talent

v. Culture

w. Self-perception

OBJECTIVE 2

Select from lists reasons for studying human relations. Circle each correct answer.

1. Human relations usage and training are important because
   a. Efficiency remains the same
   b. Allows more employee turnover
   c. Produces more interest in work and improves social relationships
   d. Only the employers opinions are that important
2. The ability to get along with others is important on the job because
   a. You are representing yourself
   b. You need to impress others to be accepted
   c. You are expected to be able to work as member of a team
   d. You will have more chance of getting your own way
3. As an ambassador or representative of you company, you will be expected to
   a. Treat all customers equally
   b. Give special service to the customers you like
   c. Wait on the customers who look like they have more money
   d. Refuse to wait on customers who are rude to you
4. Human relations skills are not important when
   a. Living at home
   b. Working on an assembly line
   c. Waiting on customers
   d. Reading a book
5. Reaching one's goals often depends upon the ability to get along with others.
   a. True
   b. False

6. There are fewer service organizations today, so there is less need for people to have good human relations skills.

   a. True

   b. False

7. Human relations skills are the basis of cooperating with others to achieve a goal.

   a. True

   b. False

8. Human relations skills will enable you to understand others more easily.

   a. True

   b. False

9. Human relations skills do not effect whether or not you keep your job.

   a. True

   b. False

10. Human relations skills will help you enjoy interaction with people on your job more so that you will be more satisfied with your job.

    a. True

    b. False

OBJECTIVE 3

Select from lists statements about physical and emotional characteristics of personality. Circle each correct answer.

1. Physical characteristics

   a. Can never be changed

   b. Are not important

   c. Often determine first impressions

   d. Refers to all side of personality

2. Emotional needs
    a. Should be denied
    b. Are sometimes expressed in destructive ways
    c. Are just what they appear to be
    d. Are less important when choosing a career
3. By becoming more aware of our own personal characteristics, we can
    a. Use them to our advantage to get what we want
    b. Ignore other's personal characteristics
    c. Understand others better to get them to do what we want
    d. Become more sensitive to the emotional and physical characteristics of others
4. Emotional characteristics of personality
    a. Are displayed through our behavior toward other people
    b. Are not important
    c. Cannot be changed
    d. Do not relate to getting along with others
5. All people have
    a. A positive attitude
    b. Emotional and physical characteristics
    c. The same feeling about situations
    d. The same attitudes
6. Feelings, values and attitudes
    a. Are not influenced by religious beliefs
    b. Have no effect on our self-image
    c. Are physical characteristics
    d. Reflect the attitudes we have learned from infancy

7. Our emotions are not affected by physical changes.

   a. True

   b. False

8. Emotions should not cloud our evaluation of the facts of a situation.

   a. True

   b. False

9. Physical characteristics of personality

   a. Usually must be accepted

   b. Include body structure and body appearance

   c. Can be totally changed

   d. None of the above

   e. All of the above

10. By identifying our weaknesses and strengths, we can improve our behavior.

    a. True

    b. False

OBJECTIVE 4 **Define basic needs that influence lifestyles.**

1. Physiological ______________________________

   ____

   ____

2. Safety and security __________________________

   ____

   ____

3. Attention needs ____________________________

   ____

   ____

4. Esteem and self-respect ______________________________

____

____

5. Self-actualization ______________________________

____

____

OBJECTIVE 5

Select from a list true statements about characteristics of attitude and their effects on behavior. Write an "X" in the blank before each true statement.

____ 1. We are born with our attitudes.

____ 2. Our attitudes reflect the way we feel about others.

____ 3. The way we feel about ourselves affects the way we behave and react to different situations.

____ 4. Attitudes cannot be changed.

____ 5. Acting "macho" impresses employers.

____ 6. Employers value an employee who has a positive attitude.

____ 7. The people you come into contact with get the same impression of you as you have of yourself.

____ 8. People do not form attitudes about others based on race.

____ 9. A person's attitude about someone affects their dealing with that individual on a business or personal level.

___ 10. Positive attitudes can increase a person's chances to succeed.

OBJECTIVE 6

Evaluate the need for good study habits and pride in work, at school, and on the job.

Read the following examples and give suggestions as to how the individuals could improve their performance on the job.

1. Candy is a secretary in an insurance office. It is her job to code and file all the insurance papers that have been submitted by clients for a claim. Her desk is always a mess and several times papers have been misplaced and could not be located. Her supervisor made some suggestions to her on how she could organize her work area, but Candy resented being told how to do her job. How can Candy improve her performance and keep her job?

2. Tim is a checker-cashier at the local hardware store. He enjoys his job because he gets to meet so many interesting people. At the end of the day he always has a problem matching up his tape with the cash in the drawer. He had errors on the tape that he couldn't remember how he had resolved them. Consequently, he spent over an hour each evening trying to straighten out his cash with the tape. His employer told him he would have to solve his problem or he would be fired. What can he do to solve his problem?

3. Mindy is an auto mechanic at a large car dealership. She is doing the best she can do, but sometimes she makes mistakes on interpreting the computer readouts on the diagnostic machine. Because of her errors, she was kidded by her fellow workers about learning how to read the machine correctly. She thought they were discriminating against her because she was female, so she got mad and reported them for sexual harassment. In the investigation, it was discovered that they were not teasing her because she was female, but because she was too stubborn to allow anyone there to teach her how to correctly use the machine. What can Mindy do to solve her dilemma?

____

____

____

____

____

4. Kent is a salesman at a western store. He is shy, and is afraid to approach people to ask them if they need help. He is afraid to ask questions of the other employees, and he just stands around afraid to ask what his job responsibilities are. His supervisor has started noticing that his sales are very low, and he talks to him about his problem. How can Kent improve his work performance and keep his job?

____

____

____

OBJECTIVE 7

List the problem solving steps in order.

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________

OBJECTIVE 8

List characteristics of a good employee. Write 8 characteristics in the space provided.

____

____

____

____

____

____

____

____

OBJECTIVE 9

Identify ways an employee can get along with co-workers, employers, and customers. Select from a list those statements which are true about getting along with others on the job. Write an "X" in the blank before each true statement.

____ 1. Pretend to know all about the business.

____ 2. Accept the authority of the supervisor.

____ 3. Handle merchandise and supplies respectfully.

____ 4. When a supervisor suggests a change in the way you do your job you should do it the way he or she wants it done.

____ 5. Know all your co-workers by name.

____ 6. If no one introduces you to the other employees, just go about your business and ignore them.

____ 7. Do not smile at anyone who does not smile at you first.

____ 8. Listen, ask questions, and thank the other employees who try to be helpful.

____ 9. Treat each customer as a guest, the customer is the reason the business exists.

____ 10. Customers can help themselves and come find you when they need you.

____ 11. Argue with a customer if you know you are right.

____ 12. Realize that there will be some difficult customers and that you must be tactful.

___ 13. Respond to a flirt by slapping them.

___ 14. Politely avoid complainers and respond in a positive cheerful manner.

___ 15. Passive behavior is to act positively, to affirm or declare.

OBJECTIVE 10

List benefits of setting goals. Write four benefits in the space provided.

OBJECTIVE 11

Discuss time wasters and how time can be managed more efficiently. Write three time wasters and how time can be managed more efficiently in the space provided.

OBJECTIVE 12

List guidelines for making a written time plan.

NOTICE The following assignment sheet is not a part of the written test. If this activity has not been completed, check with your instructor.

OBJECTIVE 13 **Recognize levels of human needs.** SCORE ________

WRITTEN TEST ANSWERS

USING HUMAN RELATIONS SKILLS

V

OBJECTIVE 1

1. h
2. c
3. d
4. n
5. b
6. g
7. j
8. f
9. l
10. a
11. m
12. k
13. o
14. r
15. q
16. p

OBJECTIVE 2

1. c
2. c
3. a
4. d
5. a
6. b
7. a
8. a
9. b
10. a

OBJECTIVE 3

1. c
2. b
3. d
4. a
5. b
6. d
7. b
8. a
9. b
10. a

OBJECTIVE 4

1. Food, water, air, shelter, clothing, sex, sleep - physical survival needs
2. Being free from injury or harm, life insurance, job security
3. Social acceptance and belonging to a group, social activity, peer acceptance or being a member of a group or team
4. Positive feedback that a person gets from others, feeling good about oneself, being proud of a job well-done

5. The feeling of having achieved one's goal, exhilaration of success

OBJECTIVE 5

- 2, 3, 6, 7, 9, 10

OBJECTIVE 6

1. Candy needs to organize her desk and set goals for getting paper work filed in a timely manner. She also needs to realize her supervisor is suggesting ways she can improve her performance. She needs to respect the advice of her supervisor.

2. Tim needs to concentrate more on his accuracy in using the cash register and counting change to the customers. He needs to visit with customers less and when he makes errors he needs to make a note on the cash-tape.

3. Mindy needs to realize that her success as an auto mechanic depends on her being able to correctly use the equipment - not because she is being discriminated against. If she doesn't know how to operate the equipment she needs to ask someone to show her.

4. Kent can force himself to approach customers to find out what they are looking for to overcome his shyness. When he doesn't know how to do something he needs to ask the supervisor. He was hired to make sales and if he doesn't he will lose his job.

OBJECTIVE 7

1. Recognize the problem
2. Get the facts
3. Weigh the facts
4. Determine the goal or objective
5. Make a decision on one solution from many possibilities
6. Take action
7. Check results

OBJECTIVE 8

Answer should include any eight of the following:

- Cooperation
- Initiative
- Honesty
- Willingness to learn
- Following directions
- Neat appearance
- Patience
- Leaving personal problems at home
- Punctuality
- Good attendance
- Dependability
- Enthusiasm
- Accepting criticism well
- Loyalty
- Sense of humor
- Positive attitude
- Tactfulness
- Interest in the job

OBJECTIVE 9

2, 3, 4, 5, 8, 9, 12, 14

OBJECTIVE 10

- Give direction and purpose to actions.
- Let a person know when success is achieved.
- Help bring about desired conditions.
- Create self-confidence by allowing a person to experience a series of small successes.

OBJECTIVE 11 Discussion should include the following. Student should list three from the first bullet.

- Time wasters should include:
  - Procrastination
  - Lack of planning
  - Lack of goals or objectives
  - Lack of priorities
  - Overcommitment
  - Crisis situations
  - Haste, indecision
  - Distractions
- You can manage your time more efficiently by setting goals and priorities. Then, make a realistic time plan based on your priorities.
- Then, be decisive and offer yourself an incentive for following your time plan and do the hardest tasks at the times you work best.
- Evaluate regularly your use of time. Is it helping you to reach your goals?

OBJECTIVE 12

- Keep plan simple.
- Make your list complete.
- Keep plans flexible.
- Make plan workable.

OBJECTIVE 13 Refer to answers to Assignment Sheet 1.

OBJECTIVE SHEET

HANDLING MONEY

VI

INTRODUCTION

Have you ever been given the wrong change after making a purchase, or been charged the wrong price for an item? Handling money efficiently and effectively is an important part of any agribusiness. This unit will cover procedures and information regarding handling money so that you will be able to handle business transactions in an efficient manner in your place of employment. This in turn will prevent customers from losing confidence in a particular business and will help prevent high costs to your employer.

UNIT OBJECTIVE

After completing this unit, the student should know basic money handling skills which include preparing a sales ticket, handling cash, checks and using a credit card machine. The student will demonstrate these competencies by completing the assignment sheets, job sheets, and written test with a minimum of 85 percent accuracy.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to

1. Match terms associated with handling money to their correct definitions.
2. List reasons for writing a sales ticket correctly.
3. Discuss factors that can affect the final price a customer pays for a product or service.
4. Select from a list true statements about preparing a sales ticket.
5. List the steps in using a sales tax table.
6. List guidelines in counting change correctly.
7. Discuss how checks should be endorsed.
8. Select from a list characteristics of an acceptable check.
9. State general rules for cashing checks.
10. Discuss criteria for accepting credit cards, money orders, and traveler's checks.
11. Discuss when to check for credit card authorization.
12. Select from a list ways to avoid losing money to a shortchange artist.

13. Describe how to detect counterfeit money.
14. Select from a list true statements about how to report counterfeit money.
15. Explain methods of money manipulation.
16. Write sales tickets. (Assignment Sheet 1)
17. Compute sales tax and total prices. (Assignment Sheet 2)
18. Determine acceptable and unacceptable checks. (Assignment Sheet 3)
19. Demonstrate the ability to
    a. Use a credit card machine to process a sale. (Job Sheet 1)
    b. Accept cash payment for merchandise. (Job Sheet 2)

PREPARATION

- Obtain materials to supplement unit.

  NOTE: See Suggested Resources.

- Review instructional outline for this unit. Modify time frames to suit class needs and plan activities for each class period.
- Study the specific objectives to determine those you will cover in your presentation. Decide also which objectives should be taught to which students.
- Determine scope and sequence of objectives that you add. Design and develop support materials, including evaluation techniques, for additional objectives.
- Determine how you will schedule time for students to demonstrate competence in the required procedures.
- Make arrangements for guest speakers. Supply speakers with specific objectives and other appropriate sections of the unit.
- Prepare classroom.
  - Put up posters, charts, or other items dealing with handing money.
  - Have articles, brochures, and other literature dealing with handling money available for students.

DELIVERY

Objective 1

- Discuss terms and definitions. Provide students with examples to illustrate terms when possible.
- Survey class to find out their perceptions of salesclerks and how they handle money. Ask students if they have ever been shortchanged or had other mixups occur due to an inefficient salesclerk. If so, ask students how much confidence they then had in the place of business.

- Ask students if they have ever had a checkbook or credit card stolen. Relate the importance of checking credit cards and checks before accepting them as payment for merchandise.

- Invite a representative from a bank or financial institution to discuss credit card fraud, bad checks, etc. Obtain current statistics on this information to help relate the importance of material discussed in this unit.

- Have the manager of an agribusiness discuss the importance of handling money efficiently and effectively. Have the speaker discuss his or her store policies regarding handling of money.

Objective 2

- Discuss why a correct sales ticket is important. Have a store manager from a local agribusiness discuss with the class what can happen if a sales ticket which has been written incorrectly is processed.

Objective 3

- Discuss discounts and tax exemptions.

- Contact the Oklahoma Tax Commission or appropriate authority in your state regarding specific information about sales tax exemptions for agriculture.

Objective 4

- Review Information Sheet with students and then provide blank sales tickets for students to use in role play situations.

- Provide students with Supplement 1. Obtain copies of the local sales tax chart and state sales tax exemptions if different from those provided in the unit.

- Use Transparency Master 1, "Good Sales Ticket."

- Have students complete Assignment Sheet 1.

Objective 5

- Review process of figuring sales tax with students. Have students complete Assignment Sheet 2. Have students refer to the sales tax chart in Supplement 1.

Objective 6

- Use play money and devise role play situations for students to practice counting change.
- Emphasize that nothing irritates a customer more (except possibly poor service) than being shortchanged.

Objective 7

- Have a representative from a local bank or savings and loan speak to the class on how checks should be endorsed.

Objectives 8 and 9

- Discuss acceptable checks. Provide examples if possible. Use Transparency Master 2.
- Have a bank representative speak to the class.
- Have students complete Assignment Sheet 3.

Objective 10

- Review information with students. Show students examples of credit cards, money orders, and traveler's checks.

Objective 11

- Emphasize the importance of checking for credit card authorization. Have local agribusiness managers speak to the class on their policies.
- Obtain a "hotsheet" to show students how to check for stolen credit cards.

Objectives 12 through 15

- Invite a guest speaker from the Federal Bureau of Investigation, local bank, or local police department to discuss counterfeiting and shortchange artists.
- If possible, obtain current statistics on how much revenue is lost per year from these activities and the effect on local businesses.

APPLICATION

Objective 16

- Use Assignment Sheet 1 to give students practice in writing sales tickets.

Objective 17

- Use Assignment Sheet 2 to give students practice in computing sales tax and total prices.

Objective 18

- Use Assignment Sheet 3 to give students practice in determining acceptable and unacceptable checks.

Objective 19

- Use Job Sheet 1 to teach students how to use a credit card machine to process a sale.
- Use Job Sheet 2 to teach students how to accept cash payments for merchandise.

EVALUATION

Practical Test

- Explain to students that they will be asked to demonstrate procedures on the job sheets to complete the practical test.
- Describe the rating scale on the practical test.
- Give practical test.
- Reteach and retest as necessary.

Written Test

- Explain to students that they will be asked to demonstrate on the written test actions listed in the specific objectives.
- Give written test.

  NOTE: The written test may be given in sections if desired.

- Evaluate students on assignment sheet and job sheet activities if not previously done.
- Reteach and retest if necessary.
- Complete appropriate section of competency profiles.

- Review individual and group performance in order to evaluate teaching methods. Adjust scope, sequence, or instructional approaches for additional lessons as required.

SUGGESTED RESOURCES

Publications

- Obtain literature or other material on handling money such as examples of sales tickets, credit card forms, tax tables, etc.

UNIT REFERENCES

- *Action Company Catalog*, 1425 N. Tennessee, McKinney, Texas 75069, n.d.
- *Agricultural Supplies and Services*, Developed by Iowa State University, Department of Science and Technology (Ames, Iowa), and the Department of Public Instruction, Career Education Division, Des Moines, Iowa, 1981.
- *Animal Health Catalog*, Tufts & Son, 711 W. Reno, Oklahoma City, Oklahoma 73128, n.d.
- *Distributive Education II*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1976.
- Hilgenberg, Gene, and Jane Huston, *Employment in Agribusiness*, Mid-America Vocational Curriculum Consortium, Inc., Stillwater, Oklahoma, 1984.
- *Omaha Vaccine Company Summer 1989 Catalog*, P. O. Box 7228, 3030 "L" Street, Omaha, Nebraska 68107-0228, 1989.
- Stewart, Bob R., Michael J. McCaskey, and Mark K. Mullinix, *Agricultural Business Sales and Marketing*, Volume 16, Number 1, Instructional Materials Laboratory, University of Missouri-Columbia, Columbia, Missouri, 1984.

BASIC ACADEMIC SKILLS

The following table identifies the basic academic skills that are reinforced in this unit of instruction. These basic academic skills were identified using *The Basic/Essential Skills Taxonomy*, 2nd ed. and verified during the validation process.

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 1	Language Arts 013	Applies/Uses	Definitions	
	Free Enterprise 006	Defines	Economic terms	
OBJECTIVE 2	Free Enterprise 110	Describes/ Explains	Merchandising	
OBJECTIVE 3	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
	Free Enterprise 006	Defines	Economic terms	
	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
OBJECTIVE 4	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 5	Language Arts 147	Comprehends	Information-written	Sequence

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 6	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 7	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 8	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 9	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 10	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 11	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 12	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 13	Language Arts 132	Comprehends	Information-Written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 14	Language Arts 139	Comprehends	Information-written	Context
OBJECTIVE 15	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
OBJECTIVE 16	Language Arts 035	Attends	Directions/ task	
	Mathematics 029	Computes	Addition	Mixed numbers
	Science 042	Applies/Uses	Maps/charts/ tables/graphs	
	Language Arts 058	Composes/Edits	Forms/documents	
OBJECTIVE 17	Mathematics 261	Uses calculator	Addition	
	OR Mathematics 022	Computes	Multiplication	Mixed numbers
	and Mathematics 029	Computes	Addition	Mixed numbers
	Science 042	Applies/Uses	Maps/charts/ tables/graphs	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 18	Language Arts 191	Evaluates	Information-written	Validity
	Science 043	Applies/Uses	Models/ theories/laws	
OBJECTIVE 19a	Language Arts 035	Attends	Directions/ task	
	Language Arts 058	Composes/ Edits	Forms/ documents	
	Mathematics 261	Uses calculator	Addition	
	OR Mathematics 022	Computes	Multiplication	Mixed numbers
	and Mathematics 029	Computes	Addition	Mixed numbers
	Science 042	Applies/Uses	Maps/charts/ tables/graphs	
OBJECTIVE 19b	Language Arts 035	Attends	Directions/ task	
	Language Arts 058	Composes/ Edits	Forms/ documents	
	Mathematics 261	Uses calculator	Addition	
	OR Mathematics 022	Computes	Multiplication	Mixed numbers
	and Mathematics 029	Computes	Addition	Mixed numbers
	Science 042	Applies/Uses	Maps/charts/ tables/graphs	

INFORMATION SHEET

HANDLING MONEY

VI

OBJECTIVE 1

Match terms associated with handling money to their correct definitions.

- **Bulk discount**—Discount given for buying in large amounts

  NOTE: Bulk items are usually not packaged individually.

- **Cash discount**—Discount given for paying cash for merchandise

  NOTE: This discount is usually no larger than two or three percent and is figured after other discounts have been applied.

- **Counterfeit bill**—Money made by an individual but not approved by the U.S. government
- **Credit card**—A card allowing a customer to charge or delay payment on purchases made
- **Denomination**—Value or size of a piece of currency
- **Early season discount**—Discount for buying merchandise before season
- **Endorsement**—Signature placed on the back of a check by the person cashing it
- **Extension**—Amount indicated in last column of a sales ticket; it may be the unit price of a single item or the combined cost figured by multiplying quantity times unit price

  EXAMPLE:

Quantity	Item Description	Price	Amount
3	Dog vitamins	7.00	21.00

- **Manipulate**—To handle by artful or unfair methods in order to deceive
- **Money order**—Order issued by a post office, bank, or telegraph office for payment of money at another office
- **Multiple pricing**—Pricing merchandise in terms of quantities of more than one unit

- **Personal check**—Check given by a customer to pay for merchandise

- **Postdating**—Dating a check for a date later than when the check is written

- **Quantity discount**—Discount given for buying large volumes of merchandise

  NOTE: This discount is usually given for feed, seed, fertilizer, oil, and fuel.

- **Sales tax**—A certain percent of the total bill

- **Sales ticket**—List of merchandise sold, stating customer's name and address, items, quantity, price, tax, and terms of sale; used as a permanent record for customer and business

- **Serial numbers**—Numbers on denominations of paper money which identifies them

- **Shortchange artist**—A person who is an expert in cheating the cashier by confusion and distraction

- **Traveler's check**—Check guaranteed by deposits at the bank which issues the check; may be replaced if lost or stolen; must be signed at the bank and again in the presence of the person cashing the check

- **Two-party check**—Endorsing a check and passing it along to another party

  NOTE: Businesses often hesitate to accept two-party checks, because even if they know the person who is trying to cash the check, they may not know the person who originally wrote it.

OBJECTIVE 2 **List reasons for writing a sales ticket correctly.**

- It provides a permanent record of each sale.

- It provides the business with necessary information for inventory records, sales tax reports, and customer accounts.

- It aids in making refunds and exchanges.

- A signed sales ticket (by customer) serves as a legal agreement to pay debt.

- It builds confidence in the salesperson and in the business as a whole.
- It reduces arguments and misunderstandings with customers.
- It helps deter shoplifting and ticket alteration.

OBJECTIVE 3 **Discuss factors that can affect the final price a customer pays for a product or service.**

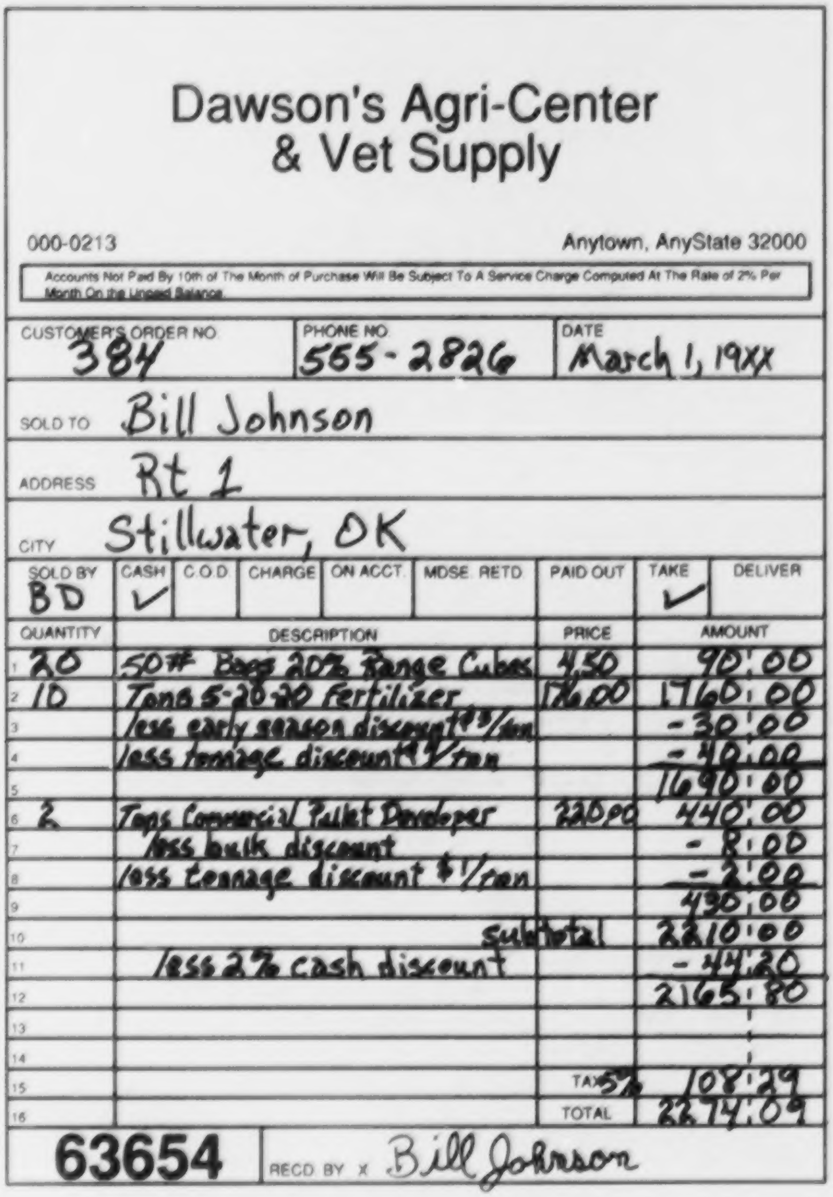
- Discounts
    - **Cash discount**—Given if customer pays cash at the time merchandise is delivered. This money is valuable to the agribusiness because it can be used immediately. Cash discounts usually range from 1-3 percent and are applied after all other discounts have been deducted.
    - **Quantity discount**—Given if customer buys a large amount of one type of merchandise, such as tons of fertilizer or feed, or large drums of chemicals (sometimes referred to as tonnage discount). This assists the agribusiness because it is generally less expensive for the agribusiness to handle a large quantity of merchandise at once, rather than numerous small orders.
    - **Bulk discount**—Given if customer buys merchandise in loose form, such as a truckload of feed, rather than individual sacks. Bulk purchases also save the agribusiness time and money.
    - **Early season discounts**—Given if customer purchases merchandise before the season in which it is used, such as buying seed corn in January. This helps the agribusiness save storage space and may give the business an idea of how much merchandise it needs to order.

    NOTE: Each agribusiness has its own policy regarding discounts. Check with your supervisor to find out the policy in your agribusiness.

- Tax exemptions
    - Each state has laws regarding certain items which are exempt from sales tax for farmers and others in the agriculture industry.

411

Example:



Dawson's Agri-Center
& Vet Supply

000-0213 Anytown, AnyState 32000

Accounts Not Paid By 10th of The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance.

CUSTOMER'S ORDER NO. 384

PHONE NO. 555-2826

DATE March 1, 19XX

SOLD TO Bill Johnson

ADDRESS Rt 1

CITY Stillwater, OK

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT.	MDSE. RETD.	PAID OUT	TAKE	DELIVER
BD	✓						✓	

	QUANTITY	DESCRIPTION	PRICE	AMOUNT
1	20	50# Bags 20% Range Cubes	4.50	90:00
2	10	Tons 5-20-20 Fertilizer	176.00	1760:00
3		less early season discount $3/ton		-30:00
4		less tonnage discount $4/ton		-40:00
5				1690:00
6	2	Tons Commercial Pellet Developer	220.00	440:00
7		less bulk discount		-8:00
8		less tonnage discount $1/ton		-2:00
9				430:00
10		subtotal		2210:00
11		less 2% cash discount		-44:20
12				2165:80
13				
14				
15			TAX 5%	108:29
16			TOTAL	2274:09

63654

RECD BY x Bill Johnson

OBJECTIVE 4

Select from a list true statements about preparing a sales ticket. (Transparency Master 1)

NOTE: In most companies, sales tickets are controlled documents and you must account for each one in the numerical sequence. Always be sure the information you write on a sales ticket is correct. Also, be sure you write firmly enough so that information will transfer clearly to additional copies.

- Write the correct date.
- Write the customer's name and address.

  NOTE: If a partnership, note it as such. The name and address becomes necessary if the purchase becomes a charge account.

- List a complete description of each item sold.
  - Quantity and unit should be listed as one item.

    EXAMPLES: 50 lbs, 20 gal

- Description should make clear the type of merchandise sold.

  NOTE: It should not just be a classification of merchandise type. A detailed description is needed for inventory control.

  EXAMPLE:

  50 lb Primo C 700 premix for cattle; rather than 50 lb bag medicated premix.

- Description should show the price per unit on all items.
  - List the price of a single item if more than one of the same kind of item is purchased.

    EXAMPLE: Purchase of seed packets priced at $2.00 each.

Quantity	Item Desc.	Price	Amount
4	Flower seed @ $2.00 ea.	$2.00	$8.00

- List the price of items sold in quantities.

  EXAMPLE: Purchase of overalls at 3 for $40.00.

Quantity	Item Desc.	Price	Amount
3	Overalls 3/$40.00	$40.00	$40.00

NOTE: Many sales tickets have a column heading marked "price." All merchandise should be listed at the retail price. If the customer is entitled to a discount, it will then be deducted from the retail price.

- Extensions should be mathematically correct and legible.
- Make a subtotal of the extension.
- Calculate sales tax on all taxable items, and enter under first total.
- Calculate any other types of charges (if any) and enter under sales tax calculations.

  EXAMPLES: Mixing, grinding, shelling, shipping, etc.

- Add extension column to determine total amount of sale.
- Check the block on the ticket to indicate method of payment: cash, check, charge, returned, or account.

  NOTE: If payment is to be made by check in an amount different from total amount due, it is a good idea to note the amount of the check on the sales ticket and list the amount charged for the sale; a similar notation is recommended when payment is made with a large bill.

- Get the signature of the person receiving the merchandise if the payment is to be other than cash.
- When a customer pays on an account, make out a sales ticket and mark what the person is paying for.

  EXAMPLES: Fertilizer, tools, balance on note owed

- If you make a mistake on a sales ticket, ALWAYS write VOID across the front of the sales ticket and place all copies with the other sales tickets.

  NOTE: Each sales ticket must be accounted for at the end of the business day.

- Initial the sales ticket in the appropriate block.

- Include department numbers or letters where applicable.
- Give the customer a copy of the sales ticket at time of purchase.
- File the original copy of the sales ticket as a permanent record.

  NOTE: One copy may be a delivery copy to go along with merchandise in case it is delivered, or the customer may need it to pick up items ordered.

- Always destroy any sales tickets or receipts that customers leave on the counter or floor; this keeps the store neat and helps deter shoplifting.

OBJECTIVE 5 **List the steps in using a sales tax table.** (Supplement 1)

1. Total the customer's bill.
2. Find the total amount on the tax table for your area.

   NOTE: The amount of tax to charge is in the right column next to the total amount. The example below is based on 7% sales tax.

3. Add amount on tax table to subtotal for total amount due.

EXAMPLE:		
	Subtotal	$59.65
	Sales tax	$ 4.18
	Total amount due	$63.83

OBJECTIVE 6 **List guidelines in counting change correctly.**

- Place the money received on the coin slab while making change.

  NOTE: Never put the money in the cash register before counting out change; a shortchange artist may claim he or she gave you more money than you make change for, and the amount given you cannot be proved.

- Make change with the least number of coins and bills.

  EXAMPLE: Instead of two dimes and a nickel, give the customer a quarter; instead of eight ones, give the customer a five dollar bill and three ones.

- Repeat the amount of the sale and the amount of money received by the customer.

- Count the money to yourself as it is taken from the cash register and again (aloud) back to the customer.

  EXAMPLE: If the customer owes $5.68 and gives you a ten dollar bill you would say, "That will be five sixty-eight out of ten. Five sixty-eight, five sixty-nine, five seventy, five seventy-five, six dollars, seven, eight, nine, and ten dollars. Correct? Thank you."

- Mention each new dollar denomination throughout to avoid making mistakes.

- Count each coin and bill separately.

  NOTE: Do not lump all pennies or one dollar bills together. This does not save time because most customers appreciate the courtesy and if you do not count their change separately, most people will take the time to do it anyway.

- If the customer gives you additional money, subtract the additional change given and then count back from that amount.

  EXAMPLE: If the customer owes you $11.23 and gives you $15.23, you would say, "Eleven dollars, twelve, thirteen, fourteen, and one makes fifteen. Right? Thank you."

- If you are interrupted, start over or politely ask the customer to wait until you have completed the transaction.

- Whenever possible, count the change directly into the customer's hand.

- Give receipt to customer.

- Place money received in its proper compartment in register drawer and close it. This should be done only after customer is satisfied with the transaction.

  NOTE: Never argue with customers or accuse them of cheating. If necessary, call the manager to resolve the dispute rather than argue with the customer.

OBJECTIVE 7 **Discuss how checks should be endorsed.**

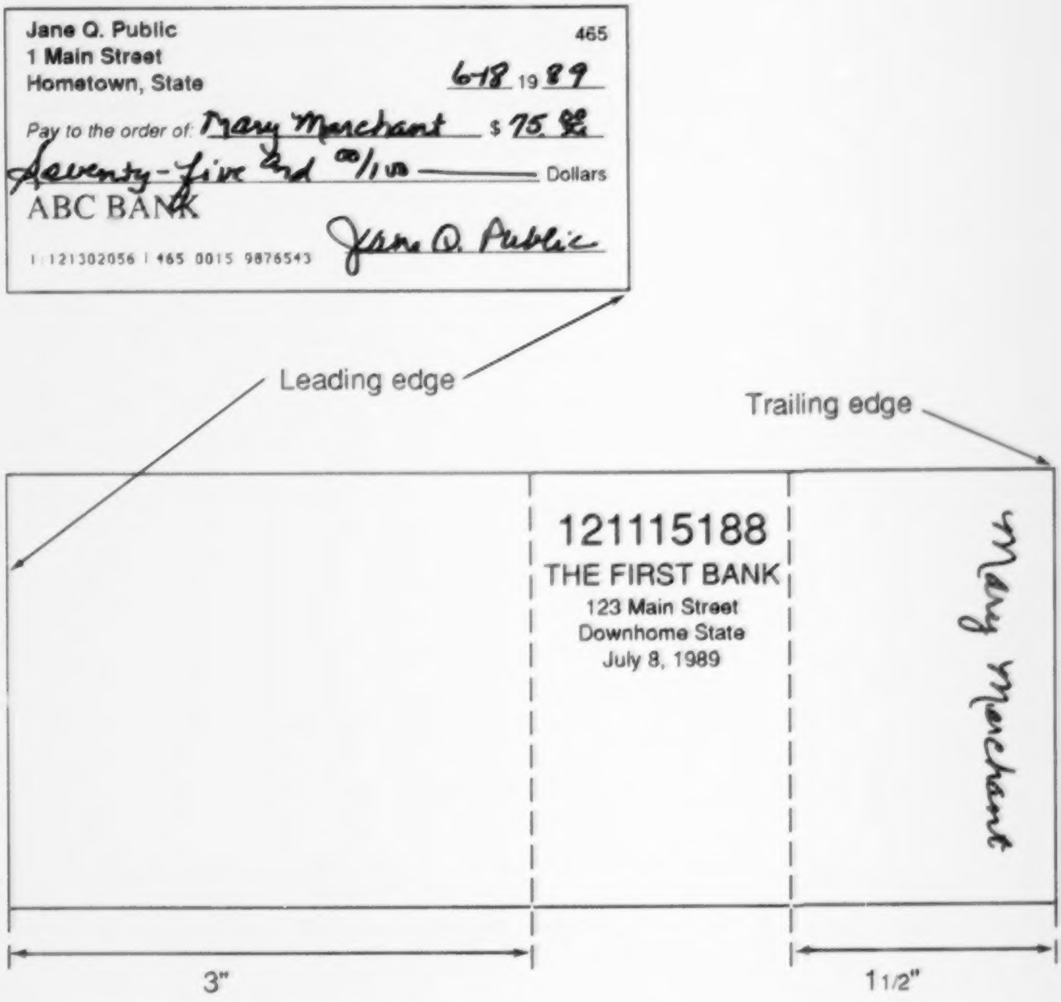
- In 1989, Congress passed a law affecting the way checks should be endorsed.

416

- Under the new law, all personal and business endorsements (1) belong on the same end of the check (on the back of the payee end of the check, the left side which says "Pay to the order of"); (2) and must be confined to the top 1 1/2 inches on the back of the check.

Be sure there is no writing, stamped information, or signs outside this area. A check may be refused acceptance if it is not properly endorsed.

Identification information is often also written in the top 1 1/2-inch area. Many businesses use a small stamp for this purpose.



Jane Q. Public
1 Main Street
Hometown, State

465

6-18 19 89

Pay to the order of: Mary Merchant $ 75.00

Seventy-five and 00/100 Dollars

ABC BANK

⑆121302056⑆465 0015 9876543

Jane Q. Public

121115188
THE FIRST BANK
123 Main Street
Downhome State
July 8, 1989

Mary Merchant

OBJECTIVE 8 **Select from a list characteristics of an acceptable check.** (Transparency Master 2)

- Check should be written in ink. Pencil written checks are unacceptable.
- Check should be dated correctly, not predated or postdated.
- Check should be signed properly by the person whose name is printed on the check.
- Customer's address and phone number should appear on the check. In many areas, "counter checks" and "starter checks" are no longer accepted. Check your company's policy.
- Amount of check should be clearly written in numbers and in words.

OBJECTIVE 9 **State general rules for cashing checks.**

NOTE: Each business will have its own policy on cashing checks.

- Check the date.

  NOTE: A postdated check may not be cashed until the date arrives; many businesses will not accept a check more than thirty days old.

- Compare the amount in figures with the written amount.
- If the check has any corrections on dates or amounts, have the customer initial them.
- Inspect signature on the check.
  - Make sure it is the same as the name printed on the check.
  - Make sure the signature on the identification matches the signature on the check.

  NOTE: If the person is not a regular customer, identification may be required. It is recommended to ask for a form of identification which shows a photo of the customer as well as his or her signature. Often, more than one form of identification is required. Check with your supervisor for store policy.

EXAMPLES: Driver's license, military, state or government identification card with current address and photo.

NOTE: Social Security Cards are *not* acceptable as identification.

- Make sure the check is made payable to the appropriate business.

  NOTE: Be sure the check is made payable to the exact name of the business.

- If check is not personalized, obtain the address of the person cashing the check.
- Never accept a check marked "For deposit only."
- Do not accept a check without an account number on it or one with an altered account number.
- Call your supervisor if the check is questionable or if his or her approval is needed before accepting the check.
- Initial the check.
- If the check is for the full amount due and is approved, treat it as a cash sale.
- Endorse the check immediately either by stamp or by placing it on the cash register printing table.

OBJECTIVE 10 **Discuss criteria for accepting credit cards, money orders, and traveler's checks.**

- Credit cards
  - Check to see that the credit card is one your business accepts.
  - Note the expiration date.
  - Make sure the signature on the credit card receipt matches the signature on the card.
  - Check the credit card number with the warning list (also called hotsheet) of bad, lost, or stolen credit cards.

NOTE: If the card is stolen, notify management at once. Do not return the credit card to the customer. Try to stall the customer. If he or she leaves, remember to get a good description.

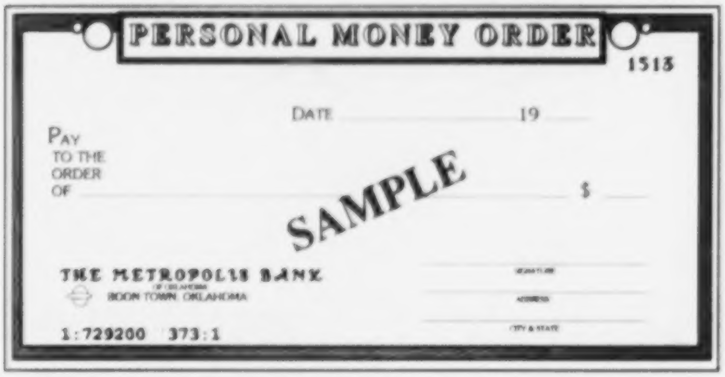
- Write in credit card numbers which do not print clearly when the card is put through the machine.

- Money orders

  NOTE: Money orders are made to send through the mail. They are often used in place of a check when a check is not accepted for legal payment.

  - Do not accept checks in payment for money orders.
  - Do not cash if the amount has been altered in any way or if it is in excess of the printed limit.
  - Check dates and signatures as on a regular check.

EXAMPLES:



PERSONAL MONEY ORDER

1513

DATE ______ 19 ___

PAY TO THE ORDER OF ______ $ ___

SAMPLE

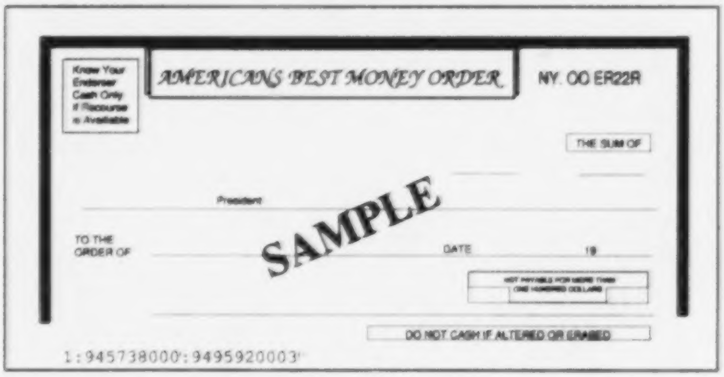
THE METROPOLIS BANK
OF OKLAHOMA
BOON TOWN, OKLAHOMA

SIGNATURE

ADDRESS

CITY & STATE

1:729200 373:1



Know Your Endorser Cash Only if Recourse is Available

AMERICANS BEST MONEY ORDER

NY. OO ER22R

THE SUM OF

President

SAMPLE

TO THE ORDER OF ______ DATE ______ 19 ___

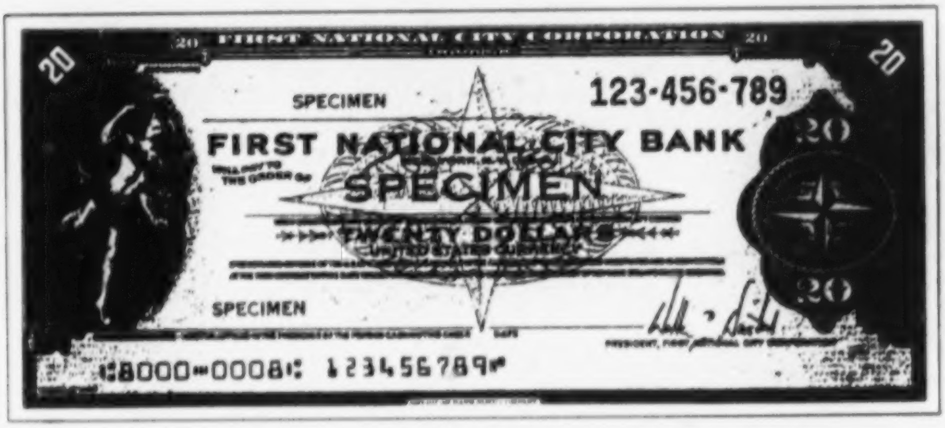
NOT PAYABLE FOR MORE THAN ONE HUNDRED DOLLARS

DO NOT CASH IF ALTERED OR ERASED

1:945738000:9495920003

- Traveler's checks
  - Be sure the customer signs the check in the presence of the person cashing it.
  - Check to see that the signature is the same as the one on the front of the check made at the time the checks were purchased at the bank.

EXAMPLES:



FIRST NATIONAL CITY CORPORATION

20

SPECIMEN

123-456-789

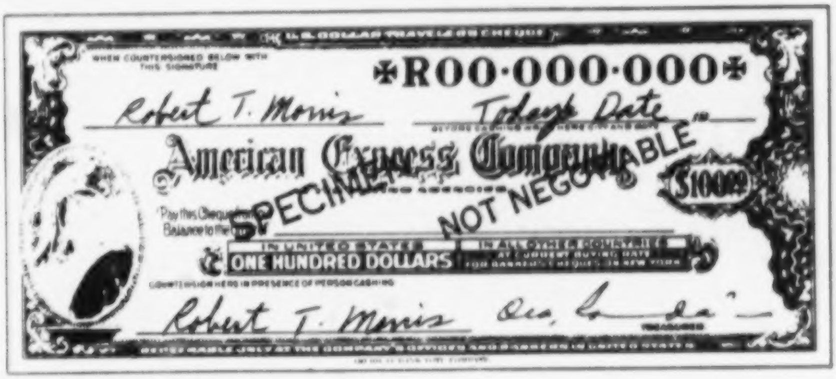
FIRST NATIONAL CITY BANK

SPECIMEN

TWENTY DOLLARS

SPECIMEN

8000-0008: 123456789



R00·000·000

Robert T. Morris

Todays Date

American Express Company

SPECIMEN NOT NEGOTIABLE

$100

ONE HUNDRED DOLLARS

Robert T. Morris

OBJECTIVE 11

Discuss when to check for credit card authorization.

NOTE: Check your business's policy for accepting credit cards. Most authorization centers provide 24-hour service seven days per week.

- Call for sales authorization
  - If the amount of sale is greater than the store limit.
  - When a credit card appears on a warning list.
  - On all telephone orders greater than $50.
  - If an individual other than the person whose signature appears on the card is using the card.

OBJECTIVE 12

Select from a list ways to avoid losing money to a shortchange artist.

A shortchange artist interrupts while the salesperson is making change, wants change back a different way than normal, rushes the salesperson, wants to buy something else, or wants to exchange the item being purchased.

- Ask the customer to wait and then finish the present transaction to avoid being interrupted and confused.

- Do not argue with the customer.

- Have the customer's money in your hand before giving any change regardless of how many times change is asked for by the customer.

NOTE: The cashier may be given a bill for payment after the change has been returned. The customer may then change a combination of bills and coins to a lesser amount and then ask for his or her bill to be returned as the lesser change is handed back to the cashier. During this type exchange, the cashier is cheated.

- Always repeat aloud the size of the bill given by the customer.

- *Close the cash drawer and contact your supervisor if you become confused.*

OBJECTIVE 13

Describe how to detect counterfeit money.

- Always compare a suspected bill with another bill of the same denomination.
- Hairlines on counterfeit bills may blend into the background rather than being distinct.
- Points around the colored seal may not be clear and sharp.
- Crisscross lines on the border may not be clear and distinct.
- The color of a bill may be too light or too dark.
- A bill may appear to be too clean, stiff, or thick.
- The prefix letter of the serial number may not agree with the district letter in the seal.

OBJECTIVE 14

Select from a list true statements about how to report counterfeit money.

- Inform your supervisor if you suspect a bill may be counterfeit.
- Write your name and date on the back of the bill for later identification.
- Write down any details you can remember about how you got it, who gave it to you, where you got it, and when you got it.
- Contact the police, U.S. Secret Service, a commercial bank, or the Federal Reserve Bank.
- Do not return the money to the customer if the bills are discovered to be counterfeit.
- Stall the person passing the bills.
- Avoid arguments because the passer may also be an innocent victim.
- Write down the passer's description and license number if he or she leaves.

OBJECTIVE 15

Explain methods of money manipulation.

- Split bill method—This method involves separating two different bill denominations by a special process, then interchanging the sides of the two bills to create two large denomination bills.

  EXAMPLE: A one-dollar and a ten-dollar bill are separated producing two bills, each having a one side and a ten side, the manipulator will pass the two changed bills which were worth $11 for $20 worth of goods.

- Another split bill method is to cut bills in half and attach the right half of a large bill to the left half of a smaller bill. The bills are then passed with a stack of larger bills.

- Marked bill method—This method involves placing some identifying marks, such as torn corners, ink spots, a red "X," or a phone number on a large bill. the individual then purchases merchandise with the marked bill. Later, the individual will make another purchase with a smaller bill but claims he or she gave the cashier a large bill. The individual is able to identify the large bill by the mark and the cashier is manipulated into giving incorrect change.

SALES TAX CHART (7 percent)

7%

4% State Sales Tax
+ 3% City/County Tax

Sales Up To	Tax	Sales Up To	Tax	Sales Up To	Tax	Sales Up To	Tax
$ 0.07	0.00	2.64	0.18	5.21	0.36	7.78	0.54
0.21	0.01	2.78	0.19	5.35	0.37	7.92	0.55
0.35	0.02	2.92	0.20	5.49	0.38	8.07	0.56
0.49	0.03	3.07	0.21	5.64	0.39	8.21	0.57
0.64	0.04	3.21	0.22	5.78	0.40	8.35	0.58
0.78	0.05	3.35	0.23	5.92	0.41	8.49	0.59
0.92	0.06	3.49	0.24	6.07	0.42	8.64	0.60
1.07	0.07	3.64	0.25	6.21	0.43	8.78	0.61
1.21	0.08	3.78	0.26	6.35	0.44	8.92	0.62
1.35	0.09	3.92	0.27	6.49	0.45	9.07	0.63
1.49	0.10	4.07	0.28	6.64	0.46	9.21	0.64
1.64	0.11	4.21	0.29	6.78	0.47	9.35	0.65
1.78	0.12	4.35	0.30	6.92	0.48	9.49	0.66
1.92	0.13	4.49	0.31	7.07	[illegible]	9.64	0.67
2.07	0.14	4.64	0.32	7.21	[illegible]	9.78	0.68
2.21	0.15	4.78	0.33	7.35	0.51	9.92	0.69
2.35	0.16	4.92	0.34	7.49	0.52		
2.49	0.17	5.07	0.35	7.64	0.53		

SALES OVER $ 10.00

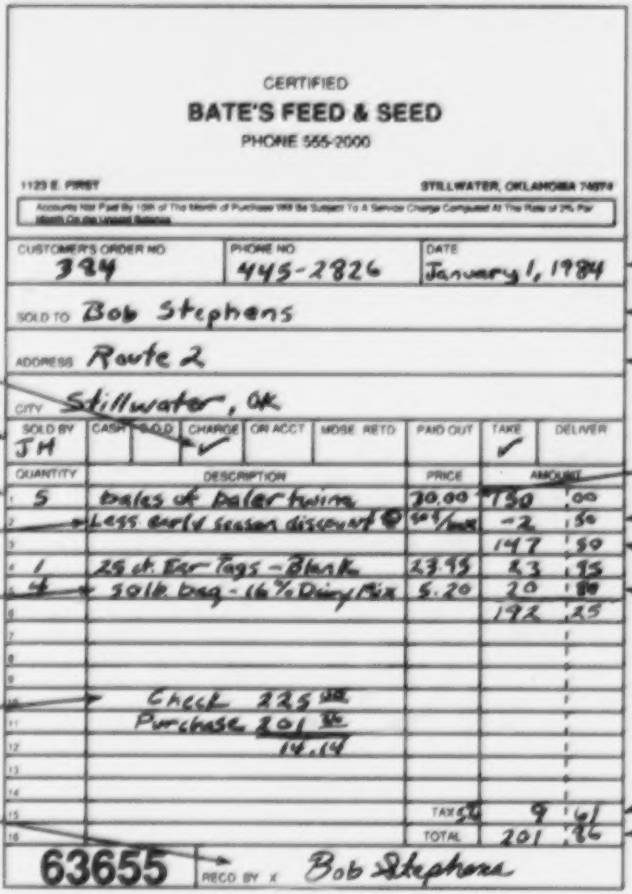
Amount	Tax	Amount	Tax
$ 10.00	0.70	$ 60.00	4.20
$ 20.00	1.40	$ 70.00	4.90
$ 30.00	2.10	$ 80.00	5.60
$ 40.00	2.80	$ 90.00	6.30
$ 50.00	3.50	$100.00	7.00

HOW TO FIGURE THE TAX:

Example: Sale is $ 55.43

Tax on $ 50.00	$ 3.50
Tax on $ 5.43	0.38
Total tax	$ 3.88

Good Sales Ticket



CERTIFIED

BATE'S FEED & SEED

PHONE 555-2000

1123 E. FIRST STILLWATER, OKLAHOMA 74074

CUSTOMER'S ORDER NO 384	PHONE NO 445-2826	DATE January 1, 1984

SOLD TO Bob Stephens

ADDRESS Route 2

CITY Stillwater, OK

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT	MDSE. RETD	PAID OUT	TAKE	DELIVER
JH			✓				✓	

	QUANTITY	DESCRIPTION	PRICE	AMOUNT	
1	5	bales of baler twine	30.00	150	00
2		Less early season discount @	50¢/bale	-2	50
3				147	50
4	1	25 ct. Ear Tags - Blank	23.95	23	95
5	4	50lb. bag - 16% Dairy Mix	5.20	20	80
6				192	25
7					
8					
9					
10		Check 225.00			
11		Purchase 201.86			
12		14.14			
13					
14					
15			TAX 5%	9	61
16			TOTAL	201	86

63655 RECD BY X Bob Stephens

Correct Date

Customer's Name

Customer's Address

Unit Price

Amount of Discount

Subtotal

Extension

Applicable Sales Tax

Grand Total

Method of Payment

Salesclerk's Initials

Quantity

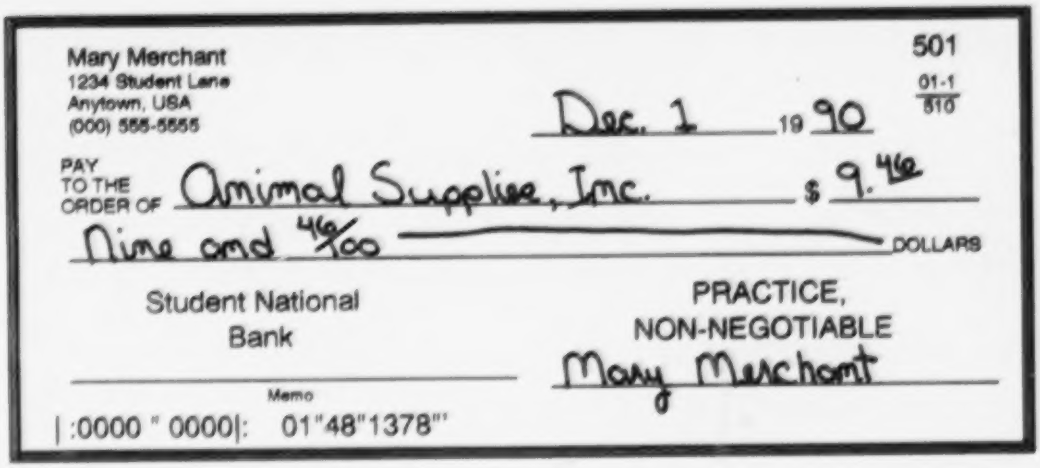
Discount

Description

Payment Transaction

Customer Signature

Elements of a Check



Mary Merchant
1234 Student Lane
Anytown, USA
(000) 555-5555

501

01-1
810

Dec. 1 19 90

PAY TO THE ORDER OF Animal Supplies, Inc. $ 9.46

Nine and 46/100 DOLLARS

Student National
Bank

PRACTICE,
NON-NEGOTIABLE

Memo

Mary Merchant

|:0000 " 0000|: 01"48"1378"'

1. Check number
2. Date
3. "Pay to the Order of" (PAYEE)
4. Amount in numerals
5. Written Amount
6. Bank on which check is drawn (DRAWEE)
7. Signature of DRAWER

4?8

ASSIGNMENT SHEET 1

HANDLING MONEY

VI

NAME ______________________________ SCORE ________

OBJECTIVE 16

Write sales tickets.

INTRODUCTION

Accurate sales tickets are important because they provide the business and the customer with a permanent record of each sale. This record is used in the business for inventory and other records and is also needed should the customer wish to exchange merchandise or receive a refund. This assignment sheet will allow you to practice writing sales tickets for purchases.

DIRECTIONS

Fill out sales tickets for the following situations. Use the sales tax table in Supplement 1. (Assume tax is to be charged for all items). Your sales associate number is 43 and all sales are paid in cash.

1. Kyle Williams purchased sixty 50 lb bags of fertilizer at $12 each, one 25 lb bag of bird seed at $7.25, five tons of 5-20-20 fertilizer for corn at $175 per ton, and one pair of rain boots at $27.50. Kyle's address is Route 2, P. O. Box 786, Yourtown, Yourstate, 00000. His phone number is 555-4567.

Dawson's Agri-Center
& Vet Supply

000-0213 Anytown, AnyState 32000

Accounts Not Paid By 10th of The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance.

CUSTOMER'S ORDER NO.	PHONE NO.	DATE

SOLD TO

ADDRESS

CITY

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT.	MDSE. RETD.	PAID OUT	TAKE	DELIVER

QUANTITY	DESCRIPTION	PRICE	AMOUNT
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15		TAX	
16		TOTAL	

63654 RECD. BY X

2. Vicky Vet bought 100 packages of dog wormer at $5.95 each, 40 bottles of flea and tick shampoo at $5.95 each, one set of CLIP-FAST animal clippers at $59.50, and two pet combs at $3.95 each. Her address is 111 Sheridan Drive, Yourtown, Yourstate, 00001. Her phone number is 555-3000.

Dawson's Agri-Center & Vet Supply

000-0213 Anytown, AnyState 32000

Accounts Not Paid By 10th of The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance.

CUSTOMER'S ORDER NO.	PHONE NO.	DATE

SOLD TO

ADDRESS

CITY

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT.	MDSE. RETD.	PAID OUT	TAKE	DELIVER

QUANTITY	DESCRIPTION	PRICE	AMOUNT
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15		TAX	
16		TOTAL	

63654 RECD. BY X

3. Sam Swensen bought three packages of Stress Away Vitamins for his chickens at $2.25 each, seven bottles of iron doser for his pigs at $3.69 each, and 10 bottles of vitamins to treat his baby pigs' anemia at $3.39 each. He also bought one quart of Insectrin EC at $19.29 to treat his poultry for mange. Sam's address is 328 Rolling Way Road, Yourtown, Yourstate, 00001. His phone number is 000-1234.

Dawson's Agri-Center & Vet Supply

000-0213 Anytown, AnyState 32000

Accounts Not Paid By 10th of The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance

CUSTOMER'S ORDER NO	PHONE NO.	DATE

SOLD TO

ADDRESS

CITY

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT.	MDSE. RETD.	PAID OUT	TAKE	DELIVER

QUANTITY	DESCRIPTION	PRICE	AMOUNT
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15		TAX	
16		TOTAL	

63654	RECD. BY X

ASSIGNMENT SHEET 2

HANDLING MONEY

VI

NAME ______________________________ SCORE _______

OBJECTIVE 17

Compute sales tax and total prices.

INTRODUCTION

In order to process a business transaction quickly, it is important to know when and how to figure sales tax for various purchases. It is just one phase of processing money in which accuracy is extremely important, both for accounting purposes and for keeping customer goodwill. This assignment sheet will enable you to practice your skills in figuring sales tax.

DIRECTIONS

Compute the sales tax as appropriate for the following purchases, based on the 7% sales tax shown in the chart in Supplement 1. If several items are listed, figure the subtotal first and then compute sales tax. Then list the grand total for the sale. All of the items listed are subject to sales tax. You may want to use a separate sheet of paper.

1. One sickle, $65.99, was purchased by Bob Brown, owner of the local pet shop.

2. Five T-posts, $2.04 each were purchased by Lone Oak Golf and Country Club.

3. Flea insecticide for dogs, one card of six, $5.95, was purchased by John Smith.

4. Kennel run, $269.95, was purchased by John Smith.

5. Nylon horse halter, $7.25, and corral lead, $6.99, was purchased by the Diamond T Stables.

6. Corner feeder, $23.25, was purchased by Indian Creek Farms for their show horse.

7. Ten-quart bucket, $3.75, and 2 1/2 bushel tub, $16.80, was purchased by John Smith, owner of the local kennels.

8. Saddle pad, $27.50, stainless steel bit, $27.95, and solid brass snap, $2.75, were purchased by Indian Creek Farms.

9. Show saddle, $1150.00, was purchased by Indian Creek Farms.

10. Rawhide bones, five at 49 cents each, were purchased by John Smith.

11. 3.5 H.P. lawn mower, $98.88, was purchased by Indian Creek Farms.

12. Fescue grass seed, 5 one lb. bags at $4.98 each, were purchased by the Lone Oak Golf and County Club.

13. Potting mix, one 40 lb. bag, $1.18 each, was purchased by Indian Creek Farms.

14. Galvanized cattle panels, 40 at $14.49 each, were purchased by Lone Oak Golf and Country Club.

15. Redwood planters, three at $8.88 each, were purchased by Indian Creek Farms.

ASSIGNMENT SHEET 3

HANDLING MONEY

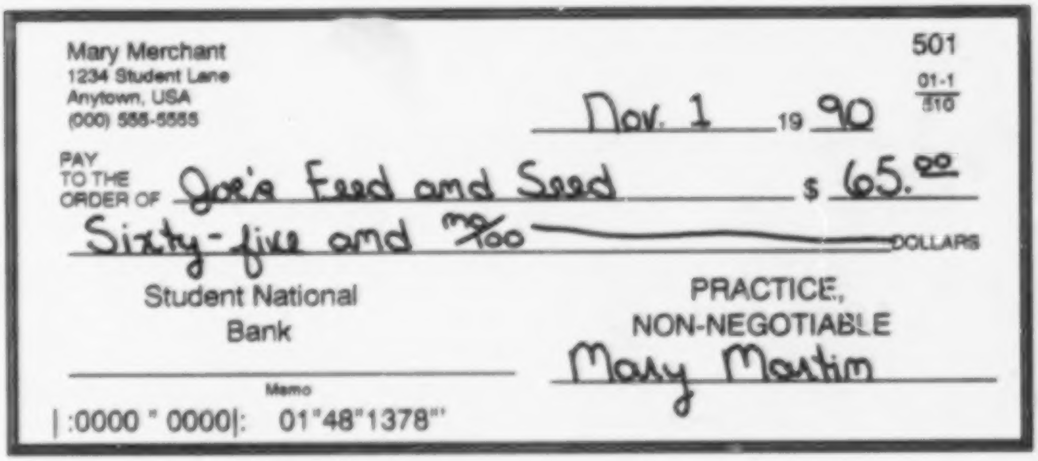
VI

NAME ______________________________ SCORE _______

OBJECTIVE 18 **Determine acceptable and unacceptable checks.**

INTRODUCTION Checks are such a common form of payment that careful scrutiny of each one is important for the agribusiness employee. A non-negotiable check may mean a delay in, or loss of payment for the agribusiness. This assignment sheet will allow you to practice accepting and rejecting checks.

DIRECTIONS For each of the following checks, list all errors you can find, if any. All checks were received on November 1, 1990.



Mary Merchant
1234 Student Lane
Anytown, USA
(000) 555-5555

501

01-1
510

Nov. 1 19 90

PAY TO THE ORDER OF Joe's Feed and Seed $ 65.00

Sixty-five and no/100 DOLLARS

Student National
Bank

PRACTICE,
NON-NEGOTIABLE

Memo

Mary Martin

|:0000 " 0000|: 01"48"1378"'

Mary Merchant
1234 Student Lane
Anytown, USA
(000) 555-5555

502

01-1
510

Nov. 1 19 90

PAY TO THE ORDER OF Anderson's Agri-Supply $ 10.39

Ten and 39/100 DOLLARS

Student National
Bank

PRACTICE,
NON-NEGOTIABLE

Memo

Mary Merchant

|:0000 " 0000|: 01"48"1378"'

Mary Merchant
1234 Student Lane
Anytown, USA
(000) 555-5555

503

01-1
510

Nov. 1 19 90

PAY TO THE ORDER OF Happy Pet Animal Supply $ 32.23

Thirty-two and 23/100 DOLLARS

Student National
Bank

PRACTICE,
NON-NEGOTIABLE

Memo

Mary Merchant

|:0000 " 0000|: 01"48"1378"'

ASSIGNMENT ANSWERS | **HANDLING MONEY** **VI**

ASSIGNMENT SHEET 1

Sales tickets should be filled out as shown below:

1.

Dawson's Agri-Center
& Vet Supply

000-0213

Anytown, AnyState 32000

Accounts Not Paid By 10th of The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance.

CUSTOMER'S ORDER NO.	PHONE NO.	DATE
	555-4567	June 2, 19XX

SOLD TO Kyle Williams

ADDRESS Rt. 2, Box 786

CITY Yourtown, Yourstate 00000

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT.	MDSE. RETD.	PAID OUT	TAKE	DELIVER
43	✓							

QUANTITY	DESCRIPTION	PRICE	AMOUNT
60	50 lb fertilizer	12.00	72.00
1	25 lb bag bird seed	7.25	7.25
5	tons 5-20-20 fertilizer	175.00	875.00
1	pr rain boots	27.50	27.50
			981.75
	sales tax		68.67
			1050.42
		TAX	
		TOTAL	

63654 RECD BY X Kyle Williams

2.

Dawson's Agri-Center & Vet Supply

000-0213

Anytown, AnyState 32000

Accounts Not Paid By 10th of The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance.

CUSTOMER'S ORDER NO.	PHONE NO.	DATE
——	555-3000	March 15, 19XX

SOLD TO Vicky Vet

ADDRESS 111 Sheridan Dr.

CITY Yourtown, Yourstate 00001

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT.	MDSE. RETD.	PAID OUT	TAKE	DELIVER
43	✓							

	QUANTITY	DESCRIPTION	PRICE	AMOUNT
1	100	pkg dog wormer	5.95	595.00
2	40	flea & tick shampoo	5.95	238.00
3	1	ClipFast animal clipper	59.50	59.50
4	2	pet combs "	3.95	7.90
5				900.40
6		sales tax		63.03
7				963.43
8				
9				
10				
11				
12				
13				
14				
15			TAX	
16			TOTAL	

63654 RECD BY x Vicky Vet

3.

Dawson's Agri-Center & Vet Supply

000-0213

Anytown, AnyState 32000

Accounts Not Paid By 10th of The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance.

CUSTOMER'S ORDER NO.	PHONE NO.	DATE
—	000-1234	October 12, 19XX

SOLD TO Sam Swensen

ADDRESS 328 Rolling Way Road

CITY Yourtown, Yourstate 00001

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT.	MDSE. RETD.	PAID OUT	TAKE	DELIVER
43	✓							

	QUANTITY	DESCRIPTION	PRICE	AMOUNT
1	3	pkg Stress Away Vitamins	2.25	6.75
2	7	bottles irondoset	3.69	25.83
3	10	bottles vitamins	3.39	33.90
4	1	qt. Insectrin EC	19.29	19.29
5				85.77
6		Sales Tax		6.00
7				91.77
8				
9				
10				
11				
12				
13				
14				
15			TAX	
16			TOTAL	

63654 RECD BY x Sam Swensen

ASSIGNMENT SHEET 2

Answers may include all or part of the following, but must include subtotals where applicable, sales tax, and grand totals.

1.	Sickle (1)	$ 65.99
	tax	+ 4.62
	Total	$ 70.61
2.	T-posts (5)	
	@ $2.04 ea.	$ 10.20
	tax	+ .71
	Total	$ 10.91
3.	Flea insecticide (1)	$ 5.95
	tax	+ .42
	Total	$ 6.37
4.	Kennel run (1)	$269.95
	tax	+ 18.90
	Total	$288.85
5.	Horse halter	$ 7.25
	Corral lead	+ 6.99
	subtotal	14.24
	tax	+ 1.00
	Total	$ 15.24
6.	Corner feeder	$ 23.25
	tax	+ 1.63
	Total	$ 24.88
7.	Bucket	$ 3.75
	Tub	+ 16.80
	subtotal	20.55
	tax	+ 1.44
	Total	$ 21.99
8.	Saddle pad	$ 27.50
	Bit	27.95
	Brass snap	+ 2.75
	subtotal	58.20
	tax	+ 4.07
	Total	$ 62.27
9.	Saddle	$1150.00
	tax	+ 80.50
	Total	$1230.50
10.	Rawhide bones	
	5 @ .49 ea.	$ 2.45
	tax	+ .17
	Total	$ 2.62

11.	Lawn mower	$98.88
	tax	+ 6.92
	Total	$ 105.80
12.	Fescue Grass Seed	
	5 @ $4.98 ea.	$ 24.90
	tax	+ 1.74
	Total	$ 26.64
13.	Potting Mix	$ 1.18
	tax	+ .08
	Total	$ 1.26
14.	Cattle Panels	
	40 @ $14.49 ea.	$ 579.60
	tax	+ 40.57
	Total	$ 620.17
15.	Planters	
	3 @ $8.88 ea	$ 26.64
	tax	+ 1.86
	Total	$ 28.50

ASSIGNMENT SHEET 3

1. Mary Martin has signed the check but it is from Mary Merchant's account.
2. No errors.
3. Numbered and written amounts do not agree, account number has been altered.

JOB SHEET 1

HANDLING MONEY

VI

OBJECTIVE 19a **Use a credit card machine to process a sale.**

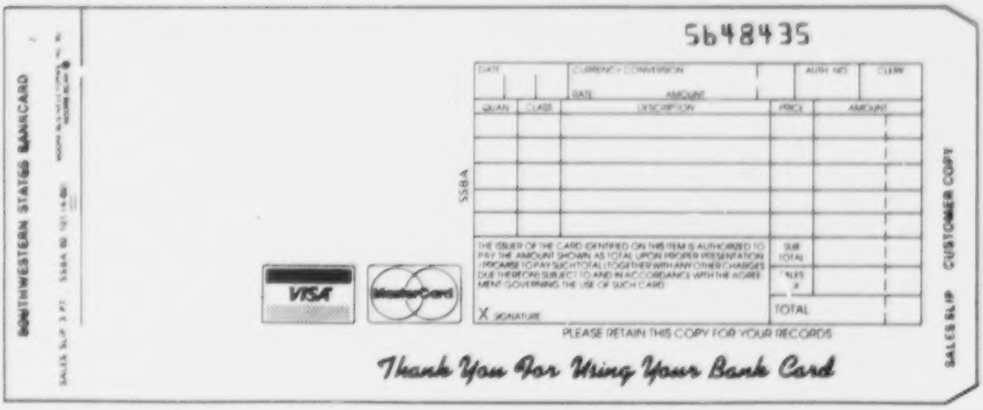
MATERIALS

- Credit card
- Imprinter
- Credit card form

PROCEDURE

NOTE: Before processing credit card sales, find out from your supervisor which credit cards are accepted by the agribusiness. Many businesses do not accept all credit cards.

1. Write date of sale on credit card form or set date on imprinter.



SOUTHWESTERN STATES BANKCARD

SALES SLIP 3 PT SSBA

5648435

DATE	CURRENCY CONVERSION RATE AMOUNT		AUTH. NO.	CLERK

QUAN.	CLASS	DESCRIPTION	PRICE	AMOUNT

THE ISSUER OF THE CARD IDENTIFIED ON THIS ITEM IS AUTHORIZED TO PAY THE AMOUNT SHOWN AS TOTAL UPON PROPER PRESENTATION. I PROMISE TO PAY SUCH TOTAL (TOGETHER WITH ANY OTHER CHARGES DUE THEREON) SUBJECT TO AND IN ACCORDANCE WITH THE AGREEMENT GOVERNING THE USE OF SUCH CARD.

X SIGNATURE

SUB TOTAL

SALES TAX

TOTAL

PLEASE RETAIN THIS COPY FOR YOUR RECORDS

SSBA

VISA

MasterCard

Thank You For Using Your Bank Card

SALES SLIP CUSTOMER COPY

Credit Card Form

2. Write a description of the merchandise purchased on the lines provided.
3. Write in price of each item.
4. Compute subtotal and list where indicated.
5. Compute sales tax and list where indicated.
6. Total the amounts on the credit card form.

7. Check expiration date on credit card to be sure it is valid.
8. Check card list to make sure credit card is valid.
9. If needed, call for sales authorization.
10. Place customer's credit card face up in slots on the machine.
11. Place credit card sales slip face up over slots on machine and over face of credit card.
12. Move imprinter handle completely across sales slip and then back to original position.
13. Remove card and form from machine.
14. Have cardholder sign sales slip, and check signature against signature on card.
15. Return card and customer's copy of completed sales slip.

    NOTE: Some customers also want carbon copies to prevent theft.

16. Retain bank's copy of sales slip for deposit.
17. Keep other copy or copies for your records.
18. Clean work area.

JOB SHEET 2

HANDLING MONEY

VI

OBJECTIVE 19b

Accept cash payment for merchandise.

MATERIALS

- Cash box or change bank
- Play money in denominations from $1-$20 and assorted change
- Sales ticket(s)
- Dummy merchandise
- Customer and salesperson

PROCEDURE

1. Salesperson should greet customer.
2. Obtain sales ticket and fill out description of merchandise and price(s).
3. Compute subtotal and figure sales tax.
4. Review sales ticket for possible errors.
5. Inform customer of total price, receive customer's money.
6. Look at customer and state amount of ticket and money.

   EXAMPLE: "That will be twelve thirty-three out of fifteen."
7. Place ticket and money to one side of cash drawer.
8. Record sale on cash register.
9. Count out correct change from cash drawer.
10. Count change back to customer out loud, beginning with amount of ticket.

    EXAMPLE: "That will be twelve thirty-four, thirty-five, forty, fifty, seventy-five, thirteen dollars, fourteen, and fifteen dollars. Thank you."
11. Hand bills to customer face up, and give customer his or her receipt.
12. Place money customer has given you in the cash box or drawer.

13. Shut cash box or drawer.
14. File sales ticket.
15. Thank the customer.
16. Bag merchandise or make arrangements for customer to pick up, if needed.
17. Clean work area.

JOB SHEET 1

Use a credit card machine to process a sale.

Student's name ____________________ Date __________

Evaluator's name ____________________ Attempt no. _____

Instructions: When you are ready to perform this task, ask your instructor to observe the procedure and complete this form. All items listed under "Process Evaluation" must receive a "Yes" for you to receive an overall performance evaluation.

PROCESS EVALUATION

Evaluator note: Write a check mark in the "Yes" or "No" blanks to designate whether or not the student has satisfactorily achieved each step in this procedure. If the student is unable to achieve this competency, have the student review the materials and try again.

The student:	YES	NO
1. Filled out form correctly.	_____	_____
2. Computed sub-total, tax, and grand total correctly.	_____	_____
3. Processed form and card on imprinter correctly.	_____	_____
4. Checked signature and expiration date.	_____	_____

EVALUATOR'S COMMENTS

____

____

____

PRODUCT EVALUATION

Evaluator note: Rate the student on the following criteria by circling the appropriate numbers. Each criterion must receive a rating of "3" or higher to demonstrate student mastery. (See performance evaluation key). A student who is unable to demonstrate mastery should review the material and submit another product for evaluation.

Criteria:	4	3	2	1
Information recorded on form is legible & accurate				

443

EVALUATOR'S COMMENTS

____

____

____

AVERAGE RATING

Evaluator note: To obtain an average rating for the competency profile, total the designated points in "Product Evaluation" and divide by the total number of criteria. Circle the rating on the "Performance Evaluation Key" below.

PERFORMANCE EVALUATION KEY

4 - Skilled—Can perform job with no additional training

3 - Moderately skilled—Has performed job during training program; limited additional training may be required

2 - Limited skill—Has performed job during training program; additional training is required to develop skill

1 - Unskilled—Is familiar with process, but is unable to perform job

PRACTICAL TEST 2

HANDLING MONEY

VI

JOB SHEET 2

Accept cash payment for merchandise.

Student's name ____________________________ Date ___________

Evaluator's name __________________________ Attempt no.____

Instructions: When you are ready to perform this task, ask your instructor to observe the procedure and complete this form. All items listed under "Process Evaluation" must receive a "Yes" for you to receive an overall performance evaluation.

PROCESS EVALUATION

Evaluator note: Write a check mark in the "Yes" or "No" blanks to designate whether or not the student has satisfactorily achieved each step in this procedure. If the student is unable to achieve this competency, have the student review the materials and try again.

The student:	YES	NO
1. Filled out sales ticket correctly.	_____	____
2. Subtotal, tax, and grand total correct.	_____	____
3. Change counting process done correctly by salesperson.	_____	____

EVALUATOR'S COMMENTS

____

____

____

PRODUCT EVALUATION

Evaluator note: Rate the student on the following criteria by circling the appropriate numbers. Each criterion must receive a rating of "3" or higher to demonstrate student mastery. (See performance evaluation key). A student who is unable to demonstrate mastery should review the material and submit another product for evaluation.

Criteria:				
Customer has correct change	4	3	2	1
Sales person filed sales ticket for records	4	3	2	1
Merchandise bagged appropriately (if needed)	4	3	2	1

EVALUATOR'S COMMENTS

AVERAGE RATING

Evaluator note: To obtain an average rating for the competency profile, total the designated points in "Product Evaluation" and divide by the total number of criteria. Circle the rating on the "Performance Evaluation Key" below.

PERFORMANCE EVALUATION KEY

4 - Skilled—Can perform job with no additional training

3 - Moderately skilled—Has performed job during training program; limited. additional training may be required

2 - Limited skill—Has performed job during training program; additional training is required to develop skill

1 - Unskilled—Is familiar with process, but is unable to perform job

WRITTEN TEST

HANDLING MONEY

VI

NAME ________________________________ SCORE _______

OBJECTIVE 1

Match terms associated with handling money to their correct definitions. Write the correct letters in the blanks.

____ 1. Money made by an individual but not approved by the U.S. government

____ 2. Discount for buying merchandise before season

____ 3. To handle by artful or unfair methods in order to deceive

____ 4. Order issued by a post office, bank, or telegraph office for payment of money at another office

____ 5. A card allowing a customer to charge or delay payment on purchases made

____ 6. Discount given for buying in large amounts

____ 7. Amount indicated in last column of a sales ticket; it may be the unit price of a single item or the combined cost figured by multiplying quantity times unit price

____ 8. Signature placed on the back of a check by the person cashing it

____ 9. Pricing merchandise in terms of quantities of more than one unit

____ 10. Numbers on denominations of paper money which identifies them

____ 11. Endorsing a check and passing it along to another party

____ 12. A certain percent of the total bill

____ 13. Dating a check for a date later than when the check is written

a. Bulk discount

b. Credit card

c. Bank check

d. Extension

e. Approval card

f. Denomination

g. Preferred customer discount

h. Postdating

i. Sales tax

j. Size

k. Serial numbers

l. User tax

m. Bank note

n. Two-party check

o. Shortchange artist

p. Persuade

q. Cash discount

r. Counterfeit bill

s. Business tax credit slip

t. Sales ticket

u. Money order

v. Endorsement

___14. Discount given for paying cash for merchandise

___15. List of merchandise sold, stating customer's name and address, items, quantity, price, tax, and terms of sale; used as a permanent record for customer and business

___16. Value or size of a piece of currency

___17. A person who is an expert in cheating the cashier by confusion and distraction

___18. Check given by a customer to pay for merchandise

___19. Check guaranteed by deposits at the bank which issues the check; may be replaced if lost or stolen; must be signed at the bank and again in the presence of the person cashing the check

___20. Discount given for buying large volumes of merchandise

w. Personal guarantee

x. Traveler's check

y. Manipulate

z. Quantity discount

aa. Multiple pricing

bb. Early season discount

cc. Personal check

OBJECTIVE 2

List reasons for writing a sales ticket correctly. Write four reasons in the space provided.

____

____

____

____

____

____

____

____

____

____

____

____

OBJECTIVE 3

Discuss factors that can affect the final price a customer pays for a product or service.

OBJECTIVE 4

Select from a list true statements about preparing a sales ticket. Write an "X" in the blank before each true statement.

____ 1. List a description (partial or complete) of each item sold.

____ 2. List quantity and unit separately.

____ 3. Write the correct date.

____ 4. Extensions should be mathematically correct and legible.

____ 5. Descriptions should show the price per unit on all items; list the price of a single item if more than one of the same kind of item is purchased; list the price of items sold in quantities.

____ 6. Do not make a subtotal of the extension.

____ 7. Description should make clear the type of merchandise sold.

____ 8. Calculate sales tax on all items, taxable and nontaxable, and enter under first total.

____ 9. Calculate any other types of charges (if any) and enter under sales tax calculations.

___ 10. Add extension column to determine approximate amount of sale.

___ 11. Check the block on the ticket to indicate method of payment: cash, check, charge, returned, or account.

___ 12. If you do not know the person, get the signature of the person receiving the merchandise if the payment is to be other than cash.

___ 13. When a customer pays on an account, make out a sales ticket and mark what the person is paying for.

___ 14. If you make a mistake on a sales ticket, tear up the ticket.

___ 15. Initial the sales ticket somewhere where there is room.

___ 16. Include department numbers or letters where applicable.

___ 17. Give the customer a copy of the sales ticket at the end of the month.

___ 18. File the original copy of sales ticket as a permanent record.

___ 19. Always destroy any tickets or receipts that customers leave on counter or floor; this keeps store neat and helps deter shoplifting.

OBJECTIVE 5 **List the steps in using a sales tax table.**

____

____

____

____

____

455

OBJECTIVE 6

List guidelines in counting change correctly. Write five guidelines in the space provided.

OBJECTIVE 7

Discuss how checks should be endorsed.

OBJECTIVE 8

Select from a list characteristics of an acceptable check. Write an "X" in the blank before each correct answer.

____ 1. Check should be written in pencil or ink.

____ 2. Check should be dated correctly.

____ 3. Check should be signed similarly to name printed on check.

____ 4. Customer's address and phone number should appear on the check.

____ 5. Amount of check should be clearly written in numbers and in words.

OBJECTIVE 9 **State general rules for cashing checks.** Write six rules in the space provided.

OBJECTIVE 10 **Discuss criteria for accepting credit cards, money orders, and traveler's checks.**

Credit cards (discuss three criteria)

Money orders (discuss two criteria)

457

Traveler's checks (discuss two criteria)

OBJECTIVE 11

Discuss when to check for credit card authorization.

OBJECTIVE 12

Select from a list ways to avoid losing money to a shortchange artist. Write an "X" in the blank before each correct answer.

____ 1. Do what the customer wants, even it involves interrupting the present activity.

____ 2. Do not argue with a customer.

____ 3. If confusion occurs, recount the money.

____ 4. Always repeat aloud the size of the bill given by the customer.

OBJECTIVE 13

Describe how to detect counterfeit money. Write four ways in the space provided.

OBJECTIVE 14

Select from a list true statements about how to report counterfeit money. Write an "X" in the blank before each true statement.

____ 1. If you suspect a bill may be counterfeit, tell the customer first.

____ 2. Write your name and date on the back of the bill for later identification.

____ 3. If bills are discovered to be counterfeit, return the bills to the customer and request another method of payment.

____ 4. Contact the Federal Banking Association.

____ 5. Write down any details you can remember about how you got it, who gave it to you, where you got it, and when you got it.

____ 6. Stall the person passing the bills.

____ 7. If necessary, argue with the customer.

____ 8. Write down the passer's description and license number if he or she leaves.

OBJECTIVE 15

Explain methods of money manipulation. Write one method in the space provided.

NOTICE The following assignment sheets and job sheets are not a part of the written test. If these activities have not been completed, check with your instructor.

OBJECTIVE 16	Write sales tickets.	SCORE ________
OBJECTIVE 17	Compute sales tax and total prices.	SCORE ________
OBJECTIVE 18	Determine acceptable and unacceptable checks.	SCORE ________
OBJECTIVE 19 a	Use a credit card machine to process a sale.	RATING ______
OBJECTIVE 19 b	Accept cash payment for merchandise.	RATING ______

HANDLING MONEY

OBJECTIVE 1

1. r
2. bb
3. y
4. u
5. b
6. a
7. d
8. v
9. aa
10. k
11. n
12. i
13. h
14. q
15. t
16. f
17. o
18. cc
19. x
20. z

OBJECTIVE 2

Answer should include any four of the following:

- It provides a permanent record of each sale.
- It provides the business with necessary information for inventory records, sales tax reports, and customer accounts.
- It aids in making refunds and exchanges.
- A signed sales ticket (by customer) serves as a legal agreement to pay debt.
- It builds confidence in the salesperson and in the business as a whole.
- It reduces arguments and misunderstandings with customers.
- It helps deter shoplifting and ticket alteration.

OBJECTIVE 3

Discussion should include the following points:

- Discounts
  - **Cash discount**—Given if customer pays cash at the time merchandise is delivered. Cash discounts usually range from 1-3 percent and are applied after all other discounts have been deducted.
  - **Quantity discount**—Given if customer buys a large amount of one type of merchandise, such as tons of fertilizer or feed, or large drums of chemicals (sometimes referred to as tonnage discount).
  - **Bulk discount**—Given if customer buys merchandise in loose form, such as a truckload of feed, rather than individual sacks.
  - **Early season discounts**—Given if customer purchases merchandise before the season in which it is used, such as buying seed corn in January. @SPACE =
- Tax exemptions
  - Each state has laws regarding certain items which are exempt from sales tax for farmers and others in the agriculture industry.

OBJECTIVE 4

3, 4, 5, 7, 9, 11, 13, 16, 18, 19

OBJECTIVE 5

Answer should include:

1. Total the customer's bill
2. Find the total amount on the tax table for your area.
3. Add amount on tax table to subtotal for total amount due.

OBJECTIVE 6

Answer should include any five of the following:

- Place the money received on the coin slab while making change.
- Make change with the least number of coins and bills.
- Repeat the amount of the sale and the amount of money received by the customer.
- Count the money to yourself as it is taken from the cash register and again (aloud) back to the customer.
- Mention each new dollar denomination throughout to avoid making mistakes.
- Count each coin and bill separately.
- If the customer gives you additional money, subtract the additional change given and then count back from that amount.
- If you are interrupted, start over or politely ask the customer to wait until you have completed the transaction.
- Whenever possible, count the change directly into the customer's hand.
- Give receipt to customer.
- Place money received in its proper compartment in register drawer and close it. This should be done only after customer is satisfied with the transaction.

OBJECTIVE 7

Discussion should include the following:

- In 1989, Congress passed a law affecting the way checks should be endorsed.
- Under the new law, all personal and business endorsements (1) belong on the same end of the check (on the back of the payee end of the check, the left side which says "Pay to the order of"); (2) and must be confined to the top 1 1/2 inches on the back of the check.

OBJECTIVE 8

2, 4, 5

OBJECTIVE 9

Answer should include any six of the following:

- Check the date.
- Compare the amount in figures with the written amount.
- If the check has any corrections on dates or amounts, have the customer initial them.
- Inspect signature on the check.
  - Make sure it is the same as the name printed on the check.
  - Make sure the signature on the identification matches the signature on the check.
- Make sure the check is made payable to the appropriate business.
- If check is not personalized, obtain the address of the person cashing the check.
- Never accept a check marked "For deposit only."
- Do not accept a check without the account number on it or one with an altered account number.
- Call your supervisor if the check is questionable or if his or her approval is needed before accepting the check.
- Initial the check.
- If the check is for the full amount due and is approved, treat it as a cash sale.
- Endorse the check immediately either by stamp or by placing it on the cash register printing table.

OBJECTIVE 10

Credit cards (discussion should include any three of the following):

- Check to see that the credit card is one your business accepts.
- Note the expiration date.
- Make sure the signature on the credit card receipt matches the signature on the card.

- Check the credit card number with the warning list (also called hotsheet) of bad, lost, or stolen credit cards.
- Write in credit card numbers which do not print clearly when the card is put through the machine.

Money orders (discussion should include any two of the following):

- Do not accept checks in payment for money orders.
- Do not cash if the amount has been altered in any way or if it is in excess of the printed limit.
- Check dates and signatures as on a regular check.

Traveler's checks (discussion should include the following):

- Be sure the customer signs the check in the presence of the person cashing it.
- Check to see that the signature is the same as the one on the front of the check made at the time the checks were purchased at the bank.

OBJECTIVE 11

Answer should include the following:

- Call for sales authorization.
  - If the amount of sale is greater than the store limit.
  - When a credit card appears on a warning list.
  - On all telephone orders greater than $50.
  - If an individual other than the person whose signature appears on the card is using the card.

OBJECTIVE 12

2, 4

OBJECTIVE 13

Description should include any four of the following:

- Always compare a suspected bill with another bill of the same denomination.
- Hairlines on counterfeit bills may blend into the background rather than being distinct.
- Points around the colored seal may not be clear and sharp.

- Crisscross lines on the border may not be clear and distinct.
- The color of a bill may be too light or too dark.
- A bill may appear to be too clean, stiff, or thick.
- The prefix letter of the serial number may not agree with the district letter in the seal.

OBJECTIVE 14 2, 5, 6, 8

OBJECTIVE 15 Explanation should include one of the following:

- Split bill method—This method involves separating two different bill denominations by a special process, then interchanging the sides of the two bills to create two large denomination bills.
- Another split bill method is to cut bills in half and attach the right half of a large bill to the left half of a smaller bill. The bills are then passed with a stack of larger bills.
- Marked bill method—This method involves placing some identifying marks, such as torn corners, ink spots, a red "X," or a phone number on a large bill. the individual then purchases merchandise with the marked bill. Later, the individual will make another purchase with a smaller bill but claims he or she gave the cashier a large bill. The individual is able to identify the large bill by the mark and the cashier is manipulated into giving incorrect change.

OBJECTIVE 16 Refer to answers to Assignment Sheet 1.

OBJECTIVE 17 Refer to answers to Assignment Sheet 2.

OBJECTIVE 18 Refer to answers to Assignment Sheet 3.

OBJECTIVE 19a Refer to Practical Test rating for Job Sheet 1.

OBJECTIVE 19b Refer to Practical Test rating for Job Sheet 2.

OBJECTIVE SHEET

USING THE CASH REGISTER

VII

INTRODUCTION

A customer's last impression of a business is just as important as their first impression. The last impression is often formed at the checkout by the way a sales transaction is handled. Knowing how to properly use a cash register is important for good customer relations and helps the business run more efficiently and consequently more profitably.

UNIT OBJECTIVE

After completing this unit, the student should be able to discuss cash registers and their use and know how to handle various customer service transactions at the checkout. The student will demonstrate these competencies by completing an assignment sheet, job sheets and written test with a minimum of 85 percent accuracy.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to

1. Match terms associated with registers and register procedures to their correct definitions.
2. Select from a list guidelines that contribute to a positive shopping experience for each customer.
3. Label the parts of a register.
4. List the advantages of using the touch method of keying.
5. List the guidelines for correct body and hand position while keying at the register.
6. Match fingers with the groups of keys they press.
7. Name the home keys.
8. Match function keys to their functions.
9. Label parts of a price ticket.
10. List common register errors.
11. State guidelines for handing exchanges, refunds and defectives.
12. Arrange in order the steps for counting the change fund.
13. State guidelines for arranging coins and bills in the cash drawer.
14. Select from a list guidelines for bagging merchandise.

15. Select from a list tasks an employee is to perform to prepare the checkout for business.

16. List ways of preventing losses and theft at the checkout.

17. Identify common register errors. (Assignment Sheet 1)

18. Demonstrate the ability to

    a) Correct register errors. (Job Sheet 1)

    b) Complete cash and credit card refunds. (Job Sheet 2)

    c) Bag merchandise. (Job Sheet 3)

    d) Key a basic sales transaction. (Job Sheet 4)

    e) Balance and/or close-out a register. (Job Sheet 5)

SUGGESTED ACTIVITIES | USING THE CASH REGISTER | VII

PREPARATION

- Obtain materials to supplement unit.

  NOTE: See Suggested Resources.

- Review instructional outline for this unit. Modify time frames to suit class needs and plan activities for each class period.
- Study the specific objectives to determine those you will cover in your presentation. Decide also which objectives should be taught to which students.
- Determine scope and sequence of objectives that you add. Design and develop support materials, including evaluation techniques, for additional objectives.
- Determine how you will schedule time for students to demonstrate competence in the required procedures.
- Make arrangements for guest speakers. Supply speakers with specific objectives and other appropriate sections of the unit.
- Since there are so many different makes, models and types of cash registers in use today, compare the explanations of the function keys in this unit to the register(s) in your classroom. Make adjustments to the materials so they conform to your register(s).

DELIVERY

Objective 1

- Discuss the unit and the specific objectives.
- Ask students, "What do you think are the responsibilities of a cashier?"
- Ask students, based on their personal experience, to identify the characteristics of a professional cashier. Discuss why these characteristics are important.
- Discuss various types of cash registers.
- Review terms and definitions. Use Transparency Masters 1 through 3.

- Have the owner or manager of a retail business discuss retail terminology.

Objective 2

- Have the owner or manager of a retail business discuss the importance of good customer service at the checkout.
- Ask students to relate good and bad experiences they have had as customers.
- Discuss how the guidelines for good customer service will contribute to a positive shopping experience for the customer.

Objective 3

- Use a register to demonstrate its parts.
- Discuss the various parts of a cash register and their functions.
- Have a cash register dealer explain the various parts and functions of a cash register.
- Talk about the differences in registers and keyboard layouts that students may encounter "on the job."
- Encourage students to compare the various registers in use in your local stores.
- Point out how it is easy to transfer your skills from one type of register to another.

Objective 4

- Discuss the advantages of the touch method and how it contributes to good customer service.

Objective 5

- Discuss and demonstrate correct body and hand position while keying.
- Let students practice correct body and hand position.

Objective 6

- Discuss and demonstrate which fingers press each key.
- Have students practice keying each finger group.

470

Objective 7

- Discuss and demonstrate the home keys.
- Discuss and demonstrate the numeric keys.
- Allow plenty of time for "hands on" experience.
- You may want to have your students practice keying on a 10-key calculator at home to build speed.

Objective 8

- Discuss and demonstrate the function keys. Use Supplement 1.

Objective 9

- Discuss the information that appears on price tickets.
- Compare price ticket information from various agribusinesses in the area.
- Discuss the importance of being able to read the price ticket information quickly and accurately while keying.

Objective 10

- Discuss and demonstrate the procedure for correcting common register errors.
- Have students complete Assignment Sheet 1, Identifying Register Errors.
- Have students complete Job Sheet 1, Correct Register Errors.
- Emphasize good customer relations and efficiency.

Objective 11

- Discuss the procedures and guidelines associated with returns.
- Emphasize treating the customer in the same manner as when the original sale was made. Stress courtesy, accuracy and efficiency.
- Ask students to relate good and bad examples of how they have been treated when returning merchandise.
- Discuss ways return situations can be used to enhance customer relations.

- Have students complete Job Sheet 2, Complete Cash and Credit Card Refunds.

Objective 12

- Explain and demonstrate how to count the change fund and arrange the cash in the drawer. Use Transparency Master 4.
- Have students count the change fund and place it in the drawer.

Objective 13

- Explain and demonstrate how to arrange coins and bills in the cash drawer.
- Stress the importance of safeguarding the cash drawer.

Objective 14

- Demonstrate and discuss proper bagging procedures.
- Provide students with an opportunity to practice bagging.
- Discuss how this part of the job impacts on customer relations and store expenses.
- Have students complete Job Sheet 3.

Objective 15

- Discuss the tasks to perform when preparing the checkout for business.

Objective 16

- Discuss the guidelines for preventing losses at the checkout.
- Have a manager or security officer discuss loss prevention at the checkout.
- Discuss the consequences for owners, customers and employees if this problem goes unchecked.

APPLICATION

Objectives 17 and 18

- Have students bring in old sales receipts and practice ringing them up on the cash register. Try to get a variety of sales situations.

- Use Assignment Sheet 1 to have students demonstrate that they can recognize the three common types of register errors.
- Use Job Sheet 1 to have students demonstrate the ability to correct register errors.
- Use Job Sheet 2 to have students demonstrate the ability to complete cash and credit card refunds.
- Use Job Sheet 3 to have students demonstrate the ability to bag merchandise.
- Use Job Sheet 4 to have students demonstrate the ability to key a basic sales transaction.
- Use Job Sheet 5 to have students demonstrate the ability to close-out a register.

EVALUATION

Practical test

- Explain to students that they will be asked to demonstrate procedures on the job sheet to complete the practical test.
- Describe the rating scale used on the practical test.
- Give practical test.
- Reteach and retest as necessary.

Written test

- Explain to students that they will be asked to demonstrate on the written test actions listed in the specific objectives.
- Give written test.

  NOTE: The written test may be given in sections if desired.

- Evaluate students on assignment sheet activities if not previously done.
- Reteach and retest if necessary.
- Review individual and group performance in order to evaluate teaching methods. Adjust scope, sequence or instructional approaches for additional lessons as required.

SUGGESTED RESOURCES

- Obtain samples of all the supplies used by a cashier, i.e., forms, sacks, register tape, dust cloths, real and/or dummy merchandise.

UNIT REFERENCES

- *Distributive Education II*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1976.
- *Learning Activity Packet: Cashier/Checker*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1983.
- *RS14-30 Series* Operation Manual Omron Tateisi Electronics Co. 1300 N. Basswood Road Schaumburg, IL 60173

BASIC ACADEMIC SKILLS

The following table identifies the basic academic skills that are reinforced in this unit of instruction. These basic academic skills were identified using *The Basic/Essential Skills Taxonomy*, 2nd ed., and verified during the validation process.

	SKILL AREA/	CODE	LINK VERB	LINK A B
OBJECTIVE 1	Language Arts 013	Applies/Uses	Definitions	
	Free Enterprise 003	Defines	Economic terms	
OBJECTIVE 2	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 3	Science 474	Identifies	Matter	Structure
OBJECTIVE 4	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 5	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 6	Language Arts 147	Comprehends	Information-written	Sequence

	SKILL AREA/	CODE	LINK VERB	LINK A B
OBJECTIVE 7	Science 342	Describes/ Explains	Matter	Structure
OBJECTIVE 8	Science 475	Identifies	Matter	Uses
OBJECTIVE 9	Language Arts 214	Identifies	Information-written	
	Language Arts 215	Identifies	Information-written	Abbreviations
OBJECTIVE 10	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 11	Language Arts 132	Comprehends written	Information-	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 12	Language Arts 146	Comprehends	Information-written	Sequence
OBJECTIVE 13	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-Oral/written	
OBJECTIVE 14	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity

	SKILL AREA/	CODE	LINK VERB	LINK A B
OBJECTIVE 15	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 16	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 17	Language Arts 013	Applies/Uses	Definitions	
	Math 229	Solves problems	Generate conclusions	Deductive reasoning
OBJECTIVE 18a	Language Arts 035	Attends	Directions/ task	
	Mathematics 026	Computes	Addition	Decimals
	Mathematics 084	Computes	Subtraction	Decimals
	Language Arts 265	Presents	Informal speech	Information requests
	Language Arts 266	Presents	Informal speech	Information supplying
	Language Arts 006	Adapts	Strategy	Speaking
	Language Arts 058	Composes/ Edits	Forms/ documents	
	Language Arts 013	Applies/Uses	Definitions	

	SKILL AREA/	CODE	LINK VERB	LINK A	LINK B
OBJECTIVE 18b	Language Arts 035	Attends	Directions/ task		
	Language Arts 058	Composes/ Edits	Forms/ documents		
	Language Arts 013	Applies/Uses	Definitions		
OBJECTIVE 18c	Language Arts 035	Attends	Directions/ task		
	Language Arts 146	Comprehends	Information-written	Sequence	
OBJECTIVE 18d	Language Arts 035	Attends	Directions/ task		
	Language Arts 146	Comprehends	Information-written	Sequence	
	Mathematics 261	Uses	Calculator		
	Mathematics 015	Calculates	Percent	In/decrease, markup/discount	
	Language Arts 146	Comprehends	Information-written	Sequence	
	Language Arts 264	Presents	Informal Speech		
OBJECTIVE 18e	Language Arts 035	Attends	Directions/ task		
	Mathematics 261	Uses calculator	Addition		
	Mathematics 268	Uses calculator	Subtraction		
	Language Arts 146	Comprehends	Information-written	Sequence	

SKILL AREA/	CODE	LINK VERB	LINK A	B
Mathematics 026	Computes	Addition	Decimals	
Mathematics 034	Computes	Addition	Whole numbers	
Mathematics 067	Computes	Multiplication	Mentally	
Language Arts 058	Composes/ Edits	Forms/ documents		
Language Arts 013	Applies/Uses	Definitions		

OBJECTIVE 1

Match terms associated with registers and register procedures to their correct definitions.
(Transparency Masters 1 through 3)

- **Cash register**—A machine that indicates the amount of each sale and records the amount of money received; usually has a change drawer and may automatically make change
- **Change fund**—Amount of money placed in cash register for use during the day

  NOTE: Sometimes referred to as the "till" or "change bank."
- **Ledger sheet**—Form on which a cashier records errors and money paid out for returns, so that at the end of the day the amount of money in the register will balance with the recorded amount of sales and taxes

  NOTE: Some businesses use individual "overring slips" and "refund slips" instead of a ledger sheet.
- **Multiple pricing**—Pricing an item in units of more than one

  EXAMPLE: 3 for $1
- **Overring**—Recording the price of an item on a cash register higher than it should be
- **Point-Of-Sale (POS) Terminal**—A type of electronic cash register wired to a computer that controls all sales (cash, charge, COD, layaway, including taxes, etc.) at the point-of-sale.

  NOTE: The POS terminal prints and issues a sales check on a cash purchase, or prints the transaction record on two copies of an inserted sales check; totals by salesperson, department or merchandise classification, taxes, etc., are automatically accumulated as a by-product of recording sales
- **Price-Look-Up (PLU)**—A feature of POS systems and some electronic cash registers which enables the register to print the current price for each item by means of "scanning" the UPC label and/or keying in the item identification number (SKU)

NOTE: This feature has reduced the need for businesses to mark every item and/or remark items when there is a price change.

- **Scanner**—Instrument that reads information from the Universal Product Code (UPC) label; may be built into the counter top or held in the cashier's hand
- **Stock-Keeping-Unit** (SKU)— The lowest level of identification of merchandise for inventory management; stock number
- **Touch method**—Operating a cash register using specific finger positions for faster speed, rhythm and accuracy
- **Tender**—That which is offered as payment, especially money
- **Underring**—Recording the price of an item on a cash register lower than it should be
- **Universal Product Code** (UPC)—Set of bars and numbers printed on a package to identify the product, manufacturer and price information when scanned by a POS system

OBJECTIVE 2

Select from a list guidelines that contribute to a positive shopping experience for each customer.

Use the following guidelines when operating the register.

- Call aloud each price in a clear distinct voice.
- Group check by departments as much as possible.
- Record each item and sale separately.
- Check the lower deck of shopping carts for missed merchandise.
- Verify the price of all unticketed merchandise that comes to the checkout.
- Never guess at a price or take the customer's word for the price.
- Know the "controlled" items your store sells and the requirements that apply to them.

  EXAMPLE: Prescriptions, special licenses, trade-ins and age are some of the more common requirements.

- Know the various sizes of packages, cans and containers your merchandise comes in, so they will not be recorded at the wrong price.
- Ensure the customer can see both your hands are away from the scale when it is necessary to weigh merchandise.
- Move items to bagging area with the left hand while keying with the right.
- Place merchandise in appropriate size sack. Use the smallest size of sack possible.
- Do not sack large bulky items, gallon containers, etc.
- Give customers your individual attention, and do not discuss trivial matters or personal problems with fellow employees.
- Stop keying if customer interrupts.
- If you become confused—STOP - CLOSE DRAWER - CALL MANAGER
- Handle complaints tactfully and courteously.
- Learn your stores code for calling for assistance, sackers, check approvals, etc.
- Call for back-up cashiers and/or sackers before you need them.

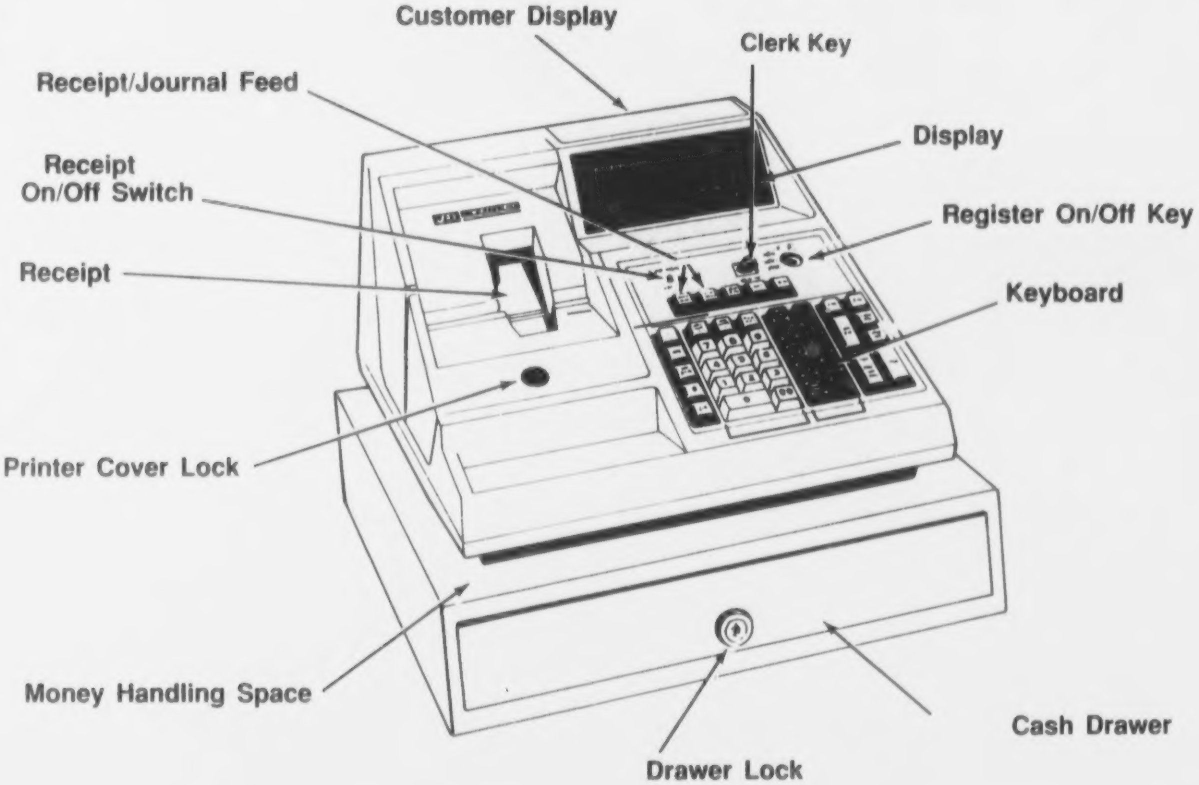
  NOTE: Most stores want you to call for assistance when you have three or more customers in line.
- Invite customers waiting in a long line to move to another check-out.
- Determine the store's policy regarding where to keep the cash register key when not in use.
- Do not block off the checkout lane while people are in line, in order to take a break.

OBJECTIVE 3 **Label the parts of a register.**

On the following page is an illustration of a typical electronic cash register highlighting some of the standard features.

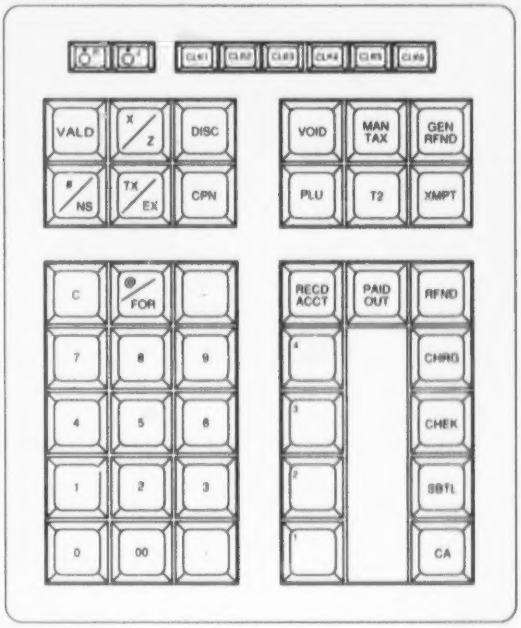
482

Parts of a Cash Register


Customer Display
Clerk Key
Receipt/Journal Feed
Display
Receipt
On/Off Switch
Register On/Off Key
Receipt
Keyboard
Printer Cover Lock
Money Handling Space
Cash Drawer
Drawer Lock

The diagram below illustrates the keyboard layout of a typical electronic cash register.

NOTE: The keyboard layouts for electronic cash registers differ, depending upon brand, model and intended use; however many keys are basic to all machines and perform the same function.


VALD
X / Z
DISC
# / NS
TX / EX
CPN
VOID
MAN TAX
GEN RFND
PLU
T2
XMPT
C
@ / FOR
-
RECD ACCT
PAID OUT
RFND
7
8
9
4
CHRG
4
5
6
3
CHEK
1
2
3
2
SBTL
0
00
.
1
CA

OBJECTIVE 4

List the advantages of using the touch method of keying.

The touch method of keying sales enables a cashier to check merchandise without looking at the keyboard.

The touch method has these distinct advantages over the "Columbus" method (discover and land):

- Faster
- More Accurate
- More Efficient
- Improves customer relations

NOTE: Using the touch method allows the cashier to turn toward the customer and maintain good eye contact.

OBJECTIVE 5

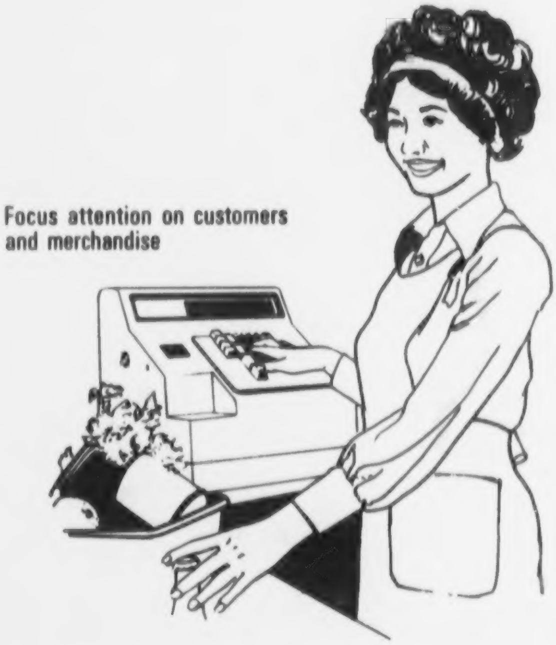
List the guidelines for correct body and hand position while keying at the register.

Follow the guidelines below to use correct body and hand position.

- Body slightly left of the keyboard.
- Arm extended to reach the keyboard.
- Eyes toward the on-coming customer and the merchandise to be keyed.
- Fingers curved slightly.
- Fingers rest lightly on the keys.
- Wrist straight.

EXAMPLE:

Proper Stance at Cash Register


Focus attention on customers and merchandise

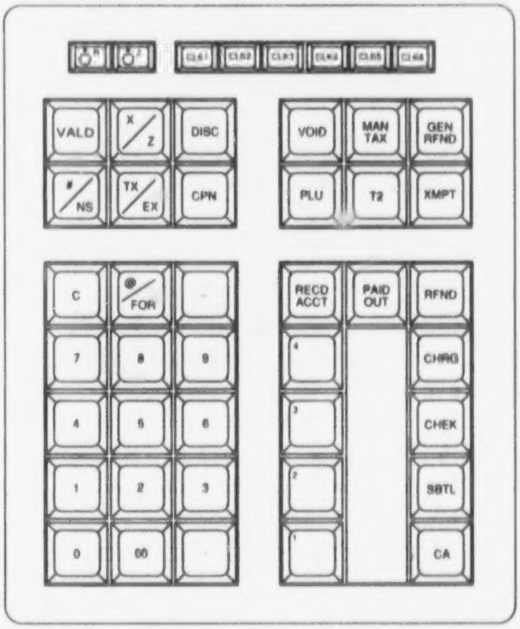
OBJECTIVE 6

Match fingers with the groups of keys they press.

DESCRIPTION

This finger:	Presses These Keys:
Thumb	0 (Zero)
Index	1, 4, 7 and CLR
Middle	2, 5, 8 and @/for
Ring	3, 6, 9 and ERR CORR
Little	Dept keys, CASH, SBTL, CHEK and CHRG

EXAMPLE:


VALD
X/Z
DISC
VOID
MAN TAX
GEN RFND
#/NS
TX/EX
CPN
PLU
T2
XMPT
C
@/FOR
RECD ACCT
PAID OUT
RFND
7
8
9
CHRG
4
5
6
CHEK
1
2
3
SBTL
0
00
CA

OBJECTIVE 7 **Name the home keys.**

DESCRIPTION

- The Home Keys are 4, 5, 6, 0 and Dept.

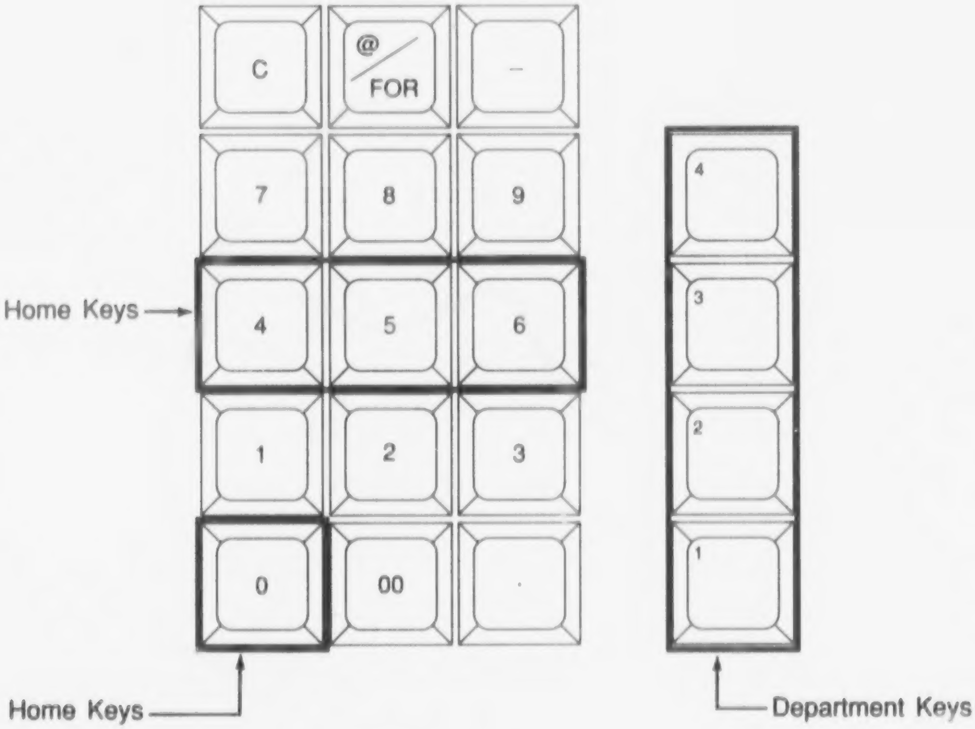
NOTE: The 5 key may have either a raised bump or an "O" ring on it to help you locate the Home Keys while keying.

GUIDELINES:

As you practice and develop your keying skills, keep your fingers on the home keys. Keep your...

- Thumb over the 0.
- Index finger over the 4.
- Middle finger over the 5.
- Ring finger over the 6.
- Little finger over Dept.

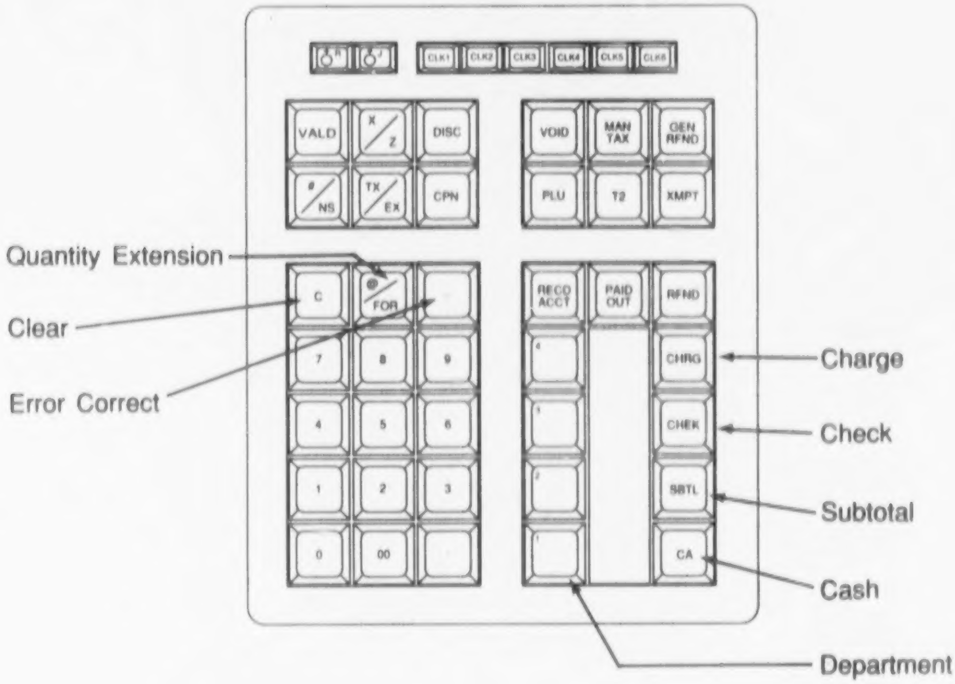
EXAMPLE:


C
@
FOR
-
7
8
9
Home Keys
4
5
6
1
2
3
0
00
.
4
3
2
1
Home Keys
Department Keys

OBJECTIVE 8

Match function keys to their functions.

The following function keys are included in touch training because they are conveniently located around the numeric keys.


CLK1
CLK2
CLK3
CLK4
CLK5
CLK6
VALD
X/Z
DISC
VOID
MAN TAX
GEN RFND
#/NS
TX/EX
CPN
PLU
T2
XMPT
Quantity Extension
Clear
Error Correct
C
@/FOR
RECD ACCT
PAID OUT
RFND
7
8
9
CHRG
Charge
4
5
6
CHEK
Check
1
2
3
SBTL
Subtotal
0
00
CA
Cash
Department

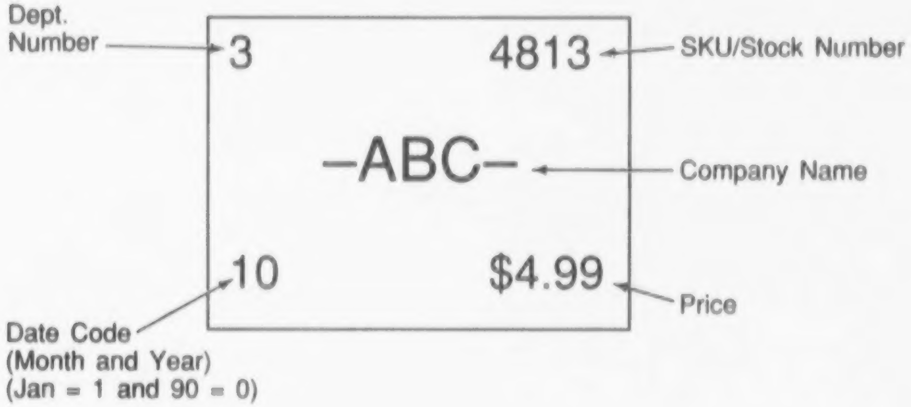
NOTE: The remaining function keys, because of their infrequent use in the cashiering process, may be activated by sight.

- **Department Keys**—Used to record items of merchandise that are sold by specific store sections
- **Cash Key**—Used to perform a payment made with cash
- **Quantity Extension Key** (@/for)—Used for multiplication of entries and split pricing
- **Clear Key**—Used to erase an "E" (error) condition and/or to clear a partial entry from the display

- **Error Correct Key**—Used to void an entry which haws just been keyed
- **Subtotal Key**—Used to display the total amount due on a sale (tax included)
- **Charge Key**—Used to perform a payment made by charge
- **Check Key**—Used to finalize sales by payments in checks

OBJECTIVE 9 **Label parts of a price ticket.**

Below is an illustration of the information that appears on a typical price ticket.


Dept. Number
3
4813
SKU/Stock Number
-ABC-
Company Name
10
$4.99
Price
Date Code (Month and Year) (Jan = 1 and 90 = 0)

OBJECTIVE 10 **List common register errors.**

- Common register errors are:
  - Underrings
  - Overrings
  - Department errors
  - Voids

NOTE: Register errors are the direct result of keying errors and customers changing their minds.

OBJECTIVE 11

State guidelines for handling exchanges, refunds, and defectives.

Most agribusinesses maintain a liberal "return" policy intended to satisfy customers' desires in the event an exchange or refund is requested.

GUIDELINES

Keep the following guidelines in mind whenever you are handling a return.

- Customers requesting an exchange or refund are to be treated in the same courteous manner as when the original purchase was made.

- Customers are encouraged to present a sales receipt as a proof of purchase; however, many businesses do not require one.

  NOTE: Since some businesses require management approval of refunds without a sales receipt, you must be aware of and follow your store's policy and procedure.

- Credit card refunds must be handled differently than a cash refund, since the purchases were not "cash" sales.

  NOTE: Most stores do not allow cash refunds for credit card purchases. Ask your store manager about your store's policy.

- Most businesses will gladly exchange merchandise bought in the store, even if a partial refund is required.

- Many stores will make "over-the-counter" replacements for any merchandise that is defective; however, some have very specific policies you must follow when making exchanges.

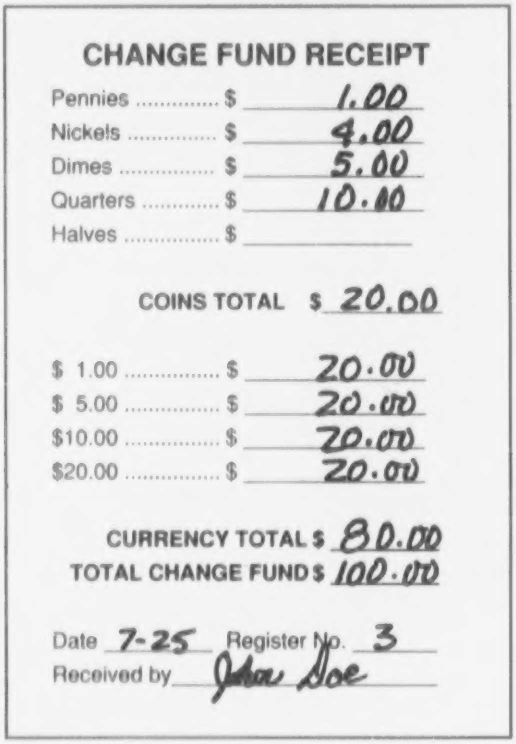
  NOTE: Discuss "handling defectives" with your manager.

OBJECTIVE 12 **Arrange in order the steps for counting the change fund.**

Before starting your work day, you will receive the money to put in your cash drawer. This money is referred to as a change fund. It is used for making change for your customer.

FORM USED

Below is an example of a completed Change Fund Receipt.



CHANGE FUND RECEIPT

Pennies .... $	1.00
Nickels .... $	4.00
Dimes .... $	5.00
Quarters .... $	10.00
Halves .... $	
COINS TOTAL $	20.00
$ 1.00 .... $	20.00
$ 5.00 .... $	20.00
$10.00 .... $	20.00
$20.00 .... $	20.00
CURRENCY TOTAL $	80.00
TOTAL CHANGE FUND $	100.00

Date 7-25 Register No. 3

Received by John Doe

PROCEDURE

Use the following steps when counting the Change Fund.

1. Get a Change Fund Receipt form from head cashier or your supervisor.

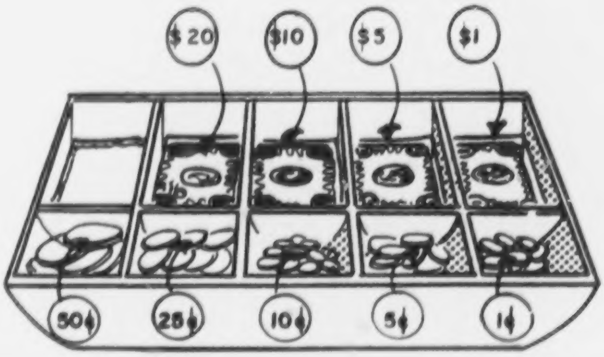
2. Separate coins and bills by denominations.

3. Count coins and post as individual amounts the totals for pennies, nickels, dimes, quarters, and halves.
4. Calculate the total for the coins.
5. Count the bills, entering amounts for the ones, fives, tens, and twenties.
6. Post the total for the bills.
7. Add the Coin Total and Currency Total and post.
8. Write today's date and register number.
9. Sign your name.
10. Put your change fund in the drawer.
11. Return completed form to head cashier.

OBJECTIVE 13

State guidelines for arranging coins and bills in the cash drawer.

Here is an example of how you should arrange the coins and bills in your cash drawer.



Change Fund in Drawer Tray

GUIDELINES

- Each denomination of coin and currency should go into its respective section.

- Arrange the money with the smaller bills and coins on the right.

- Make sure the currency is face-side up, with top of each bill to the left edge of its section.

- Place checks, coupons, and bills over $20.00 under drawer tray.

  NOTE: This is a security measure against "drawer dippers."

OBJECTIVE 14 **Select from a list guidelines for bagging merchandise.**

The ability to bag merchandise is necessary for every retail store cashier/associate. Good customer relations are maintained by the store whose employees carefully and skillfully bag customer's purchases.

BENEFITS

The reasons for bagging merchandise carefully are:

- Keeps customers happy

  NOTE: A customer should not have to contend with bags that are too heavy or that rip open and damage merchandise.

- Uses bags efficiently

  NOTE: Using bags efficiently will assist in controlling the store's operating expenses.

  NOTE: It is important to use the proper size sack when bagging merchandise. The most common sizes of sacks today and their approximate cost are shown below.

SIZE	COST PER BAG
5 lb	$.01
10 lb	.02
20 lb	.03
1/6 bbl	.05

RESULTS OF POOR BAGGING

The results of poorly bagged merchandise are:

- Broken bags
- Hard-to-handle orders
- Crushed merchandise, and
- Poor customer relations

  NOTE: Poorly-bagged merchandise includes using sacks that are either too large or too small. Also, poorly bagged merchandise can give the customer a bad impression of you and your store.

DOUBLE BAGGING

Double bagging is the practice of lining a bag with another bag of the same size. Double bagging, while expensive, is sometimes needed to protect merchandise, for example, during wet weather.

NOTE: Some stores use double strength sacks which, in most situations, eliminates the need for double bagging.

GUIDELINES

When bagging merchandise, remember to:

- Place only one layer of canned goods on bottom of sack.
- Place glass items with boxes.

  NOTE: The boxes help protect the glass from being broken.
- Place cold items together.

  NOTE: Placing cold items together keeps other merchandise from getting wet.
- Never put soaps or toxic products in with edible items.
- Place easily damaged products on top of sack.
- When packaging, check items for leaks.
- Ensure container lids are tight before sacking.

NOTE: Gallon and half-gallon containers are usually not bagged.

- Never bag clothing with hard goods.

  NOTE: Use millinery bags for soft goods.

- Use common sense—try to make each bag as light as possible while completely filling the bag.

OBJECTIVE 15

Select from a list tasks an employee is to perform to prepare the check out for business.

The check out area is one of the first areas a customer sees when entering a store. To make this initial impression a positive one, you should keep your check out neat and clean. Also, ensure you have all the supplies you will need for the day's business.

Keeping the check out area neat and clean and well supplied not only improves your store's image, but also makes your work a lot easier.

Finally, when you finish your work day, leave your area "ready" for the next cashier.

TASKS

Complete these tasks to prepare your check out for business:

- Count change fund, fill out Change Fund Receipt form and put change fund in cash drawer.
- Dust or clean the cash register and check stand.

  CAUTION: Insure no moisture gets into the keyboard.

- Ensure you have enough receipt and journal paper (sometimes referred to as sales tape).
- Check bag supply; get more of the sizes you need.
- Dust and straighten the merchandise in your area.
- Get rid of any trash in the area.
- Return to stock all unsold/returned items that have been left at your check out.
- Check daily price changes and advertised specials and post them for easy references.

OBJECTIVE 16

List ways of preventing losses and theft at the checkout.

As a cashier, you should always be aware of the activities taking place around you. By doing so, you will be assuring good store security.

GUIDELINES

- Serve only one customer at a time.
- Never allow customers behind the counter where the register is located.
- Be alert to price switching.

  NOTE: Check on items where price tickets may have been changed or switched between similar items at different retails.
- Do not take the customer's word for a price—call for a price check.

  NOTE: Never leave the check-out for price checks or check/charge approval, call your supervisor.
- Never guess at prices or measurements.
- Know how to measure and weigh items.
- Ring items correctly, calling prices for each item.
- Check the bottom of all shopping carts for items.
- Check inside items that could contain hidden merchandise.

  EXAMPLES: Garbage cans, under spray can lids, port-a-files, tool boxes, etc.
- Check for "undeclared" items.

  EXAMPLES: Books, sunglasses, gloves, hats, coats, boots, etc., that a customer might have in hand

  NOTE: It is proper to politely inquire of a customer when, in doubt, as to whether an item is paid for.
- Open the register only while ringing up a sale.
- Place large denomination bills under the tray.
- Never leave the checkstand to get change. Call for service and have it delivered. Call for change before you run out.

- Do not let an excessive amount of cash build up in your register...call for a "pick-up."

  NOTE: Ask your manager about your store's policy on "pick-ups."

- Never be distracted or bend over with the cash drawer open.

  NOTE: "Till tappers" often work in pairs so one may distract the cashier by asking about merchandise while the other one takes money from the drawer.

- IF YOU BECOME CONFUSED AT ANY TIME, CLOSE THE DRAWER AND CALL THE MANAGER.

- Close the drawer before sacking the merchandise.

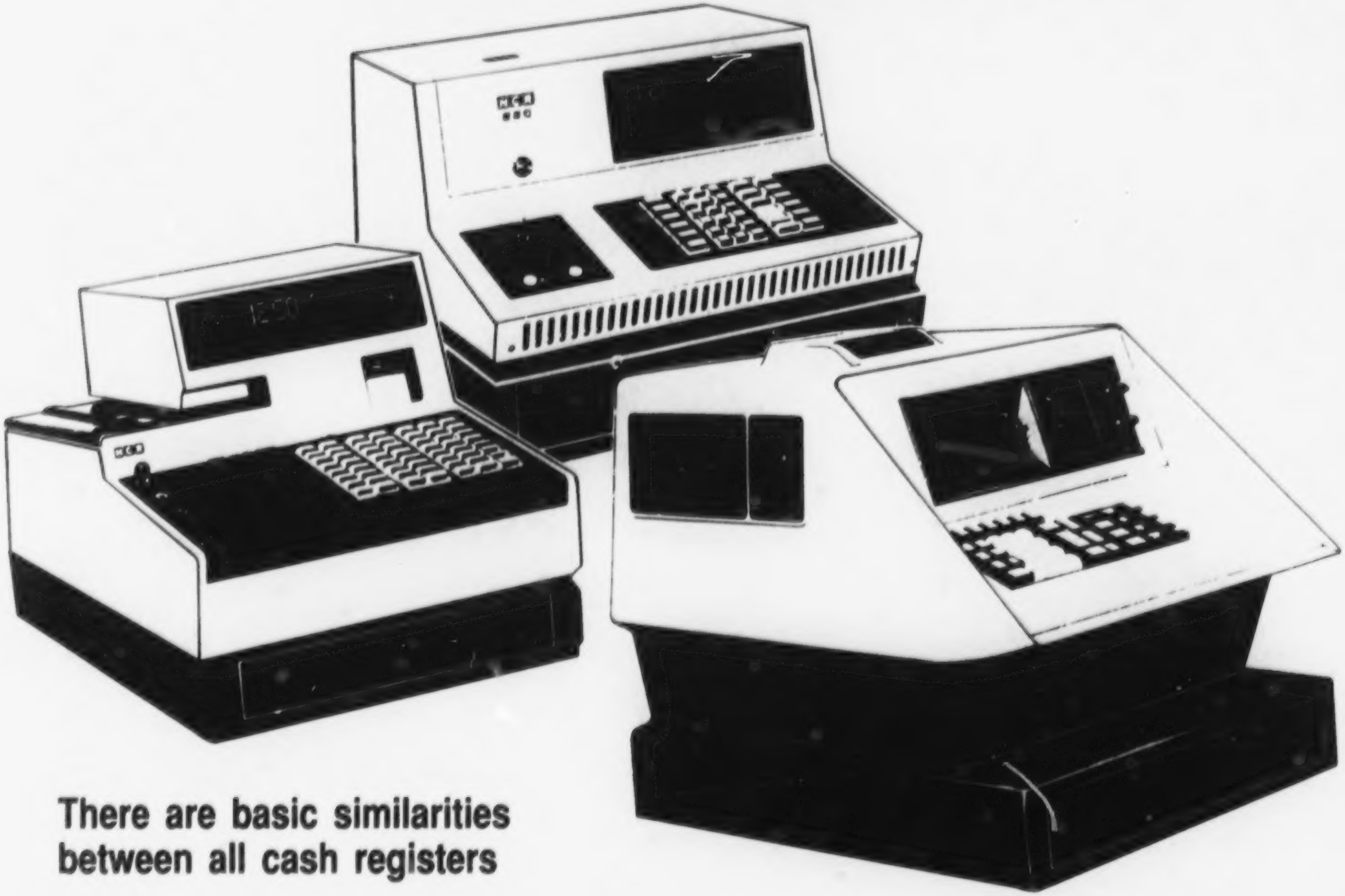
- Lock the register when not in use.

- Close unused check outs with a chain or shopping chart so customers will have to pass another cashier on their way out.

Key	Symbol	Use	Key	Symbol	Use
Discount	DISC	Perform a percentage discount on the subtotal of sale or item			
Clerk		Sign on and off the cashier	Journal Feed	J	Advance journal tape
Ten Key Pad		Enter the numeric amount	Department		Record an entry into a specific department
Double Zero	00	Key two zeros at once	Receipt Feed	R	Advance receipt tape
Decimal Point	.	Keying a manual item and subtotal discount percentage	Quantity Extension	@/FOR	Multiplication of entries and split pricing
Clear	C	Clear partial entries and error conditions	X/Z	X/Z	Obtain various terminal reports
Void	VALD	Void a previous entry	Refund	RFND	Record a refund from a specific department
Error Correct	–	Void the last entry recorded	Validation	VOID	Perform a receipt/journal validation on a document

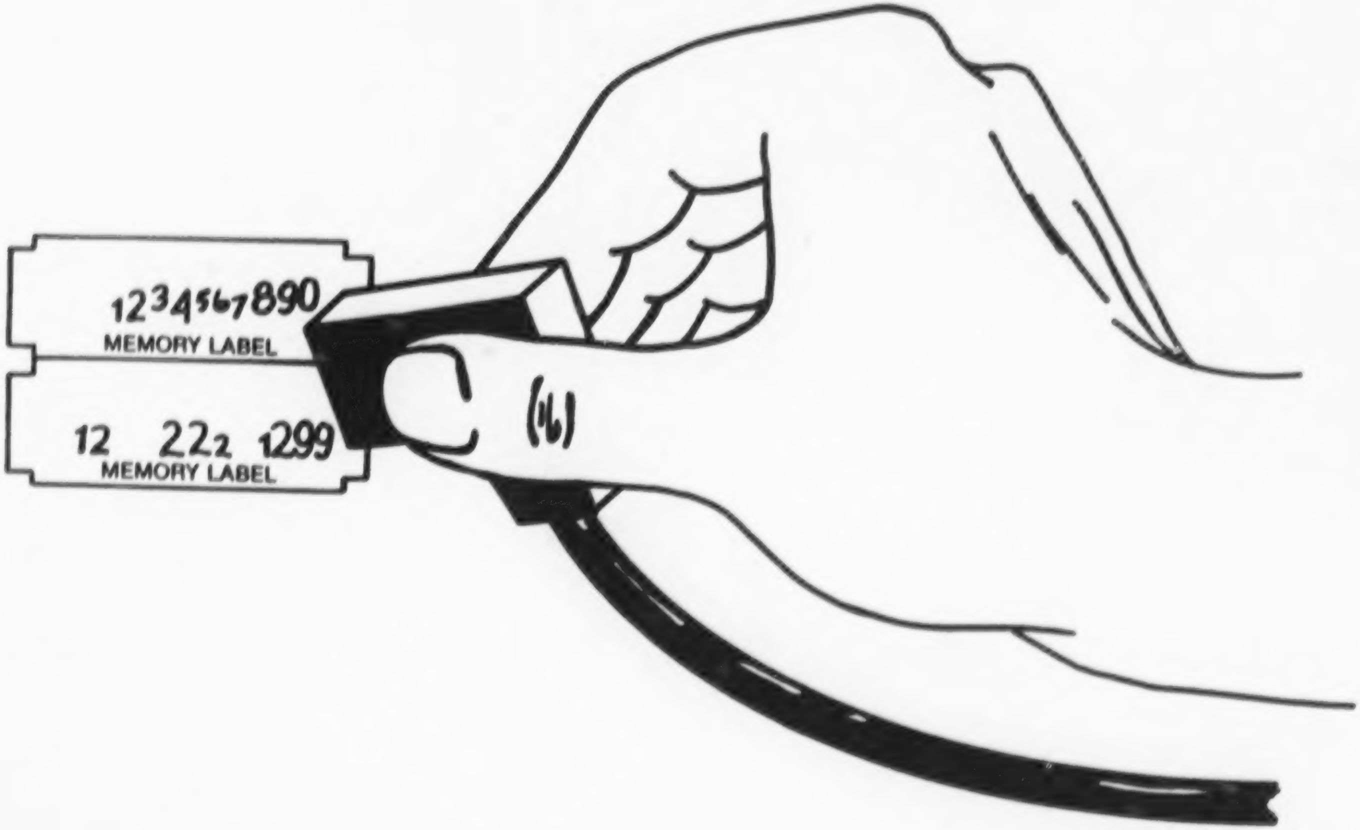
Key	Symbol	Use	Key	Symbol	Use
Check	CHEK	Record payment by check	Coupon	CPN	Record the redemption of a coupon
Charge	CHRG	Record a charge sale	No sale/non add number	#/NS	Open the cash drawer outside of a sale
Cash	CA	Record a cash payment	General Refund	GEN RFND	Record a refund not associated with a particular department
Subtotal	SBTL	Display the total sale amount due	T2	T2	Exempt tax rate 2 & display the subtotal taxable at rate 2
Paid Out	PAID OUT	Record a cash or check amount paid out from the drawer	PLU	PLU	Enter price Look up items
Received on Account	RECD ACCT	Record a customer payment on account	Manual tax	MAN TAX	Manual tax entry
Tax Exemption	XMPT	Eliminate automatic tax due	Tax exception	TX/EX	Reverse the tax status of a department or coupon

Modern Cash Registers



There are basic similarities between all cash registers

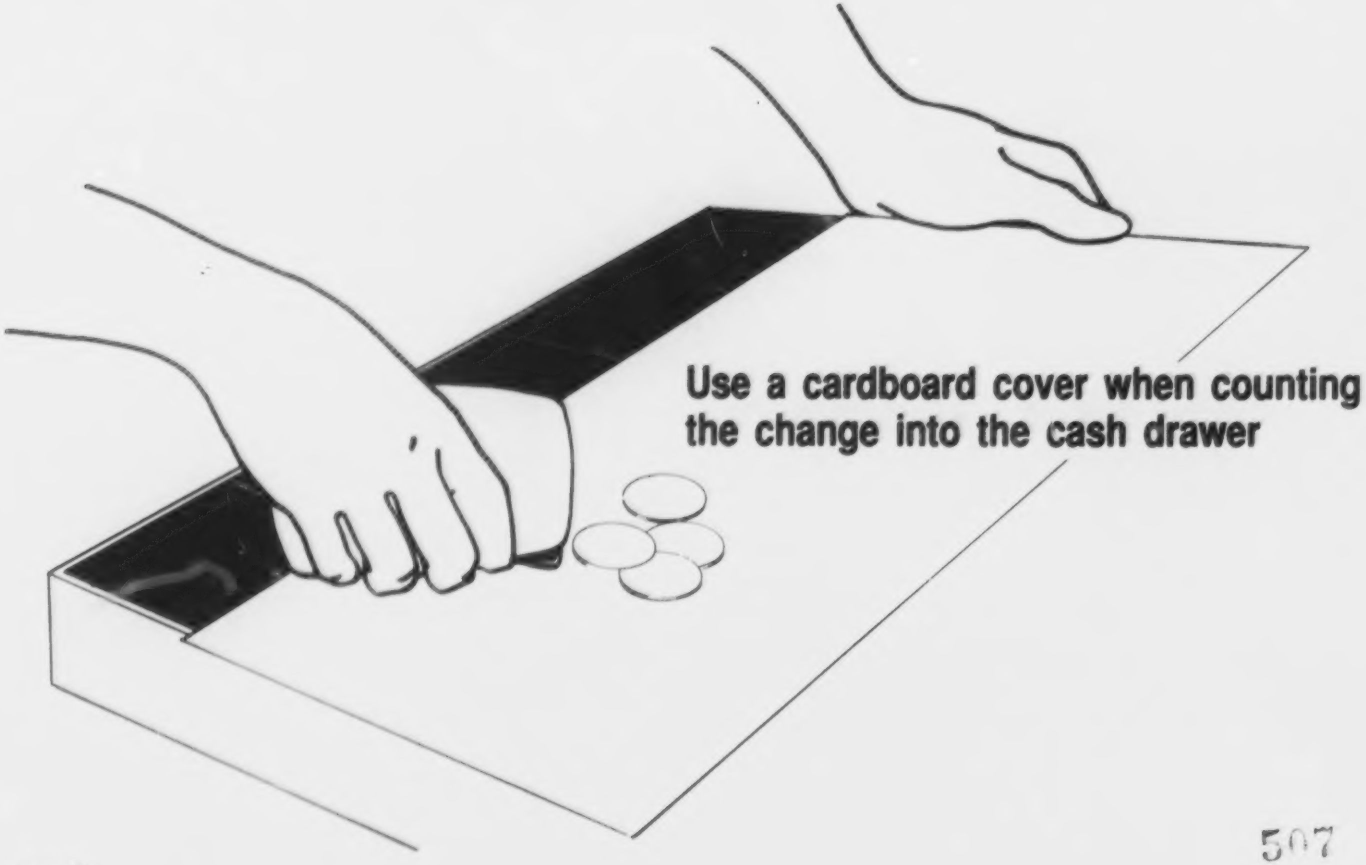
Hand Scanner


1234567890
MEMORY LABEL
12 222 1299
MEMORY LABEL

Universal Product Code

0 36000 24490

Counting the Change Fund



Use a cardboard cover when counting the change into the cash drawer

ASSIGNMENT SHEET 1

USING THE CASH REGISTER

VII

NAME ______________________ SCORE ________

OBJECTIVE 17 **Identify common register errors.**

DIRECTIONS Listed below are examples of errors that are made by cashiers when ringing up sales. Identify each type of error by writing **overring, underring**, or **departmental** in the blanks.

	Incorrect Entry	Should Be	Type of Error
1.	$.49 Dept 2	$.59 Dept 2	____________
2.	.89 Dept 2	.79 Dept 2	____________
3.	1.25 Dept 2	1.25 Dept 3	____________
4.	.99 Dept 1	.89 Dept 1	____________
5.	1.23 Dept 2	1.23 Dept 1	____________
6.	4.99 Dept 3	3.99 Dept 3	____________
7.	9.11 Dept 1	7.11 Dept 1	____________
8.	12.99 Dept 2	2.99 Dept 2	____________
9.	8.88 Dept 1	9.88 Dept 1	____________
10.	4.44 Dept 1	4.44 Dept 3	____________

ASSIGNMENT SHEET 1

1. Underring
2. Overring
3. Departmental
4. Overring
5. Departmental
6. Overring
7. Overring
8. Overring
9. Underring
10. Departmental

OBJECTIVE 18 Correct register errors.

TOOLS AND MATERIALS

- Cash register
- Register tape
- Cash register error correction forms
- Dummy merchandise
- Customer

DIRECTIONS

- Does your register have CLEAR, ERROR CORRECTION and/or VOID keys?
  - If **YES**, use Procedure "A" for this exercise.
  - If **NO**, use Procedures "B", "C" and "D" for this exercise.
- Use the "Completing A Cash Register Error Correction Form" procedure for this exercise.

PROCEDURE "A" CORRECTING REGISTER ERRORS

Follow these steps to correct register errors on registers that have CLEAR, ERROR CORRECTION and/or VOID keys.

STEP	ACTION
1	Immediately tell the customer you have made an error.
2	Briefly explain what you are doing to correct the error.
3	If the ERROR appears... / Then use...

If the ERROR appears...	Then use...
–As an "E" on display, or –An incorrect partial entry	Clear
–On the last entry	Error Correct
–After subsequent items have been entered	Void

NOTE: When a customer changes his or her mind about an item, treat the situation as a VOID.

STEP	ACTION
4	Get manager's approval.
5	Continue to ring up the remaining items.
6	Bracket the incorrect entry on the customer's receipt tape, and explain to customer.

PROCEDURE "B" HANDLING OVERRINGS

Follow these steps when an Overring occurs on a register without the VOID or ERROR CORRECTION functions.

STEPS	ACTION
1	Tell the customer you have made overring.
2	Explain that you will deduct the amount of the overring from the total of the sale.
3	Continue to ring up the other items.
4	After totaling the sale, write on the customer's receipt the amount of the overring and subtract it from the total.
5	Bracket the item that was overrung.
6	Explain this to the customer.
7	Fill out an overring form (Cash Register Error Correction).
8	Get the customer's signature.
9	Get management approval, if required.
10	Place form in the cash drawer.

PROCEDURE "C" HANDLING UNDERRINGS

Follow these steps when an Underring occurs on a register without the VOID or ERROR CORRECTION functions.

STEP	ACTION
1	Immediately call the customer's attention to the underring.
2	Tell the customer that you are going to enter the amount as the next transaction.
3	Enter the appropriate amount on the register as the next entry.
4	Continue ringing up the rest of the items.
5	Bracket both the underring error and the error correction on the customer's receipt.
6	Explain the "brackets" to the customer.

PROCEDURE "D" CORRECTING DEPT. ERRORS

Follow these steps when a department error occurs on a register without the VOID or ERROR CORRECTION function.

STEP	ACTION
1	Tell the customer about the error.
2	Fill out the Cash Register Error Correction form: — Check other. — Write in incorrect department. — -Write in correct department. — Enter amount
3	Register the remaining items in the sale.
4	After totalling the sale: Bracket the department error. — Write in the correct department on the customer's receipt.

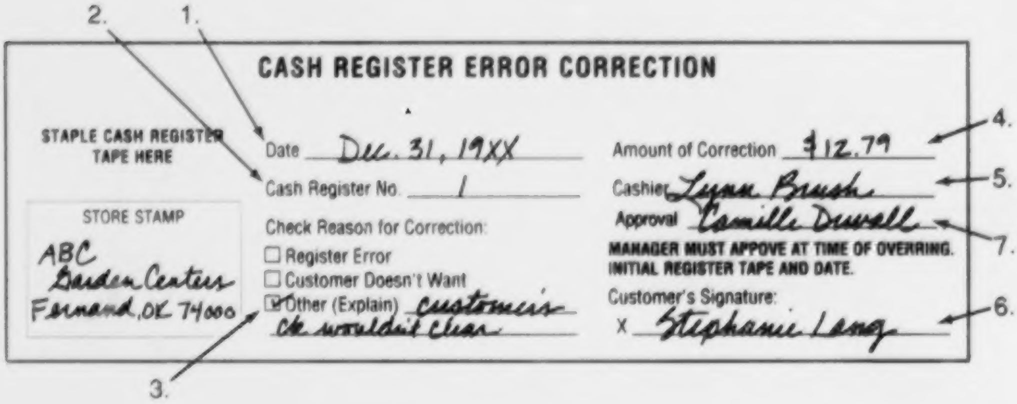
PROCEDURE Completing a Cash Register Error Correction form.

Follow these steps to complete a cash register error correction form.

1. Date the form.

2. Fill in register number.
3. Check reasons for correction or explain.
4. Enter amount of correction.
5. Sign your name.
6. Ask customer to sign the form.
7. Get the Manager's approval.
8. Initial the transaction on the register detail (audit) tape.

EXAMPLE



CASH REGISTER ERROR CORRECTION

STAPLE CASH REGISTER TAPE HERE

STORE STAMP

ABC
Garden Center
Fernand, OK 74000

Date Dec. 31, 19XX

Cash Register No. 1

Check Reason for Correction:
☐ Register Error
☐ Customer Doesn't Want
☑ Other (Explain) customer's ck wouldn't clear

Amount of Correction $12.79

Cashier Lynn Brush

Approval Camille Duvall

MANAGER MUST APPOVE AT TIME OF OVERRING. INITIAL REGISTER TAPE AND DATE.

Customer's Signature:
X Stephanie Lang

CASH REGISTER ERROR CORRECTION

STAPLE CASH REGISTER TAPE HERE

STORE STAMP

Date ____________

Cash Register No. ____________

Check Reason for Correction:
☐ Register Error
☐ Customer Doesn't Want
☐ Other (Explain) ____________

Amount of Correction ____________

Cashier ____________

Approval ____________

MANAGER MUST APPOVE AT TIME OF OVERRING. INITIAL REGISTER TAPE AND DATE.

Customer's Signature:
X ____________

JOB SHEET 2 USING THE CASH REGISTER VII

OBJECTIVE 19 **Complete cash and credit card refunds.**

TOOLS AND MATERIALS

- Cash register
- Register tape
- Play money
- Cash receipt
- Credit card receipt
- Refund slips
- Credit Card Credit Slips
- Imprinter
- Dummy merchandise
- Stapler
- Customer
- Credit Card

PROCEDURE Use the following steps when making a **refund.**

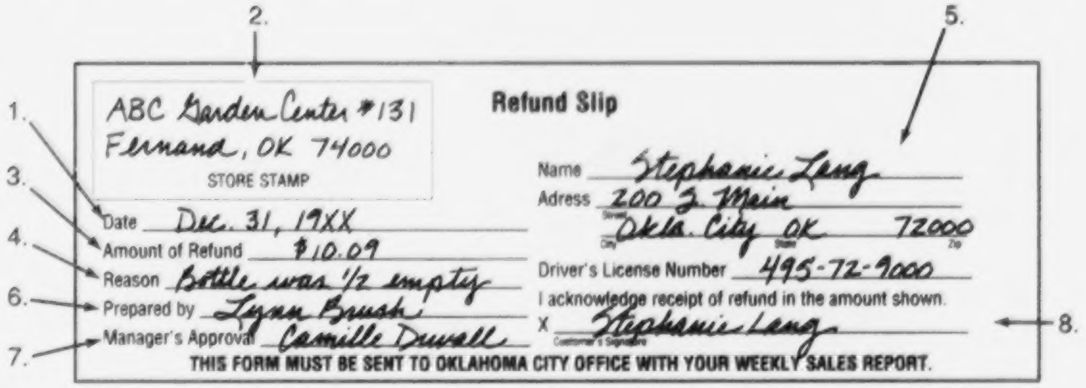
STEP	ACTION
1	Treat all customers respectfully and tactfully.
2	Does the customer have a receipt? — If **NO**, call for a price check. — If **YES**, use the original price.
3	Is this a credit card refund? — If **NO**, go to the next step. — If **YES**, follow the credit card refund procedure on page 52.
4	Complete Refund Slip.

514

STEP	**ACTION**
5	Does your register have a "refund" function? – **If NO, key a No Sale.** – **If YES, follow the appropriate keying sequence for a refund.**
6	Give the customer the amount of the refund from the register.
7	Attach the register receipt to the Refund Slip and put them in the drawer.
8	Return the merchandise to stock.

COMPLETING A REFUND SLIP

Below is an example of a completed Refund Slip.



ABC Garden Center #131
Fernand, OK 74000
STORE STAMP

Refund Slip

Date Dec. 31, 19XX
Amount of Refund $10.09
Reason Bottle was 1/2 empty
Prepared by Lynn Brush
Manager's Approval Camille Duvall

Name Stephanie Lang
Adress 200 S. Main
Okla. City OK 72000
Street City State Zip
Driver's License Number 495-72-9000
I acknowledge receipt of refund in the amount shown.
X Stephanie Lang
Customer's Signature

THIS FORM MUST BE SENT TO OKLAHOMA CITY OFFICE WITH YOUR WEEKLY SALES REPORT.

PROCEDURE Use the following steps to complete a Refund Slip.

STEP	**ACTION**
1	Fill in today's date.
2	Store stamp, if required.
3	Determine amount of refund (including tax) and enter.
4	Write reason for refund.

STEP	ACTION
5	Print customer's name and address.
	NOTE: Some businesses also ask for customer's driver's license.
6	Sign your name.
7	Get management approval.
8	Get customer's signature.

Refund Slip

STORE STAMP

Name ____________________

Adress ____________________
Street
____
City State Zip

Date ____________________

Amount of Refund ____________________

Reason ____________________

Prepared by ____________________

Manager's Approval ____________________

Driver's License Number ____________________

I acknowledge receipt of refund in the amount shown.

X ____________________
Customer's Signature

THIS FORM MUST BE SENT TO OKLAHOMA CITY OFFICE WITH YOUR WEEKLY SALES REPORT.

PROCEDURE Use the following steps when handling a **Credit Card Refund.**

STEP	ACTION
1	Ask customer for the credit card receipt he or she received when the merchandise was purchased.
2	Verify item being returned is on receipt.
3	Request customer's credit card and check the account number against the receipt.
4	Run credit card through imprinter using a Credit Card Credit Slip.
6	Give Customer Copy of Credit Card Credit Slip to customer.
7	Attach Credit Slip to Refund Slip (if required) and place them in the register drawer.

Use the following steps to complete a Credit Card Credit Slip.

STEP	ACTION
1	Imprint credit card on the form.
2	Indicate the type of credit card.
3	Check expiration date box.
4	Fill in: — Today's date — Your initials — Reason for return — Original date of sale
5	Write in: — Quantity of item — Description of item(s) — Selling price — Extended amount
6	Calculate and post: — Subtotal — Tax — Total
7	Get signature of person authorized to approve Credit Slips.

JOB SHEET 3 — USING THE CASH REGISTER — VII

OBJECTIVE 20

Bag merchandise.

TOOLS AND MATERIALS

- Dummy merchandise
  - Canned goods
  - Bulky items
  - Soft goods
  - Boxed items
  - Small items
  - Soaps or toxic sprays
  - Fragile items
  - Glass containers
  - Cold items
- Sacks

PROCEDURE

Use the following steps when placing merchandise in a sack.

1. Plan each load for each bag.

- Place heavy items at the bottom of the bag.

  EXAMPLES: Canned goods, tools, potting soil, spray paint, replacement parts.

  NOTE: Placing heavy items at the bottom of the bag helps keep the bag from tipping and prevents heavier items from crushing lighter items.

3. Place square items along the sides of the bag to keep bag opened out into a square shape.

   EXAMPLES: First aid kit, boxed grass seed, socket set, boxed tools like jig saws, routers

   NOTE: Placing square items along the sides of the bag makes the bag easier to carry and provides open space in the center of the bag for other merchandise.

4. Place merchandise in glass containers in the center of the bag to protect glass from breaking.

   EXAMPLES: Vaccines, insecticides, lamp chimneys, lamp oil, light fixtures, glues, Ortho products, medications, etc.

5. Place merchandise that is fragile or easily crushed at the top of the sack.

   EXAMPLES: Safety glasses, light bulbs, filter, books.

   NOTE: Fragile or easily crushed items must be handled carefully. Nothing should be placed on top of them.

6. Place filler items at the top of center of the bag to prevent shifting by making the bag a solid package.

   NOTE: Filler items are smaller items that fit easily between merchandise of various shapes.

   EXAMPLES: Work gloves, small tools and knives, brushes, PVC pipe fittings, etc.

JOB SHEET 4 USING THE CASH REGISTER

OBJECTIVE 21 **Key a basic sales transaction.**

INTRODUCTION

The ability to key a basic sales transaction is essential for cashiers. Errors in keying should be kept to a minimum.

TOOLS AND MATERIALS

- Cash register
- Register tape
- Play money
- Stapler
- Dummy merchandise
- Customer
- Sacks

PROCEDURE

1. Check register area for readiness.
2. Greet customer.
3. Ask: "Will this be cash or charge?"
4. Key in merchandise.
5. Ensure all items are recorded.
6. Check merchandise that could conceal items inside.
7. Subtotal and add correct sales tax.
8. Identify total to customer.
9. Accept cash payment; put cash received where it is visible.
10. Make correct change; count change back to customer starting with amount of sale.
11. Place the money in the drawer and close it; place large bills (over $20.00) under tray.
12. Place merchandise in appropriate size sack.

13. Fold top of sack over, staple receipt in center and staple each side.

14. Hand the customer the package, and say: "Thank you for shopping at Discount Agri Supply."

15. Lock the register.

16. Clean work area.

JOB SHEET 5 — USING THE CASH REGISTER

OBJECTIVE 22

Balance and/or close out a register.

INTRODUCTION

As a cashier, you may have some "paperwork" responsibilities at the end of your work day . . . completing a Cash Register Balance Sheet.

PURPOSE

The purposes for balancing your register and completing the Cash Register Balance Sheet are to:

- Check the money in the drawer against the register totals, and
- Prepare the register for the next cashier or the next day's business.

TOOLS AND MATERIALS

- Cash register
- Register audit tape-Sales $1,096.13
- Play money
  - Twenty-six $1.00 bills
  - Forty $5.00 bills
  - Sixty $10.00 bills
  - Ten $20.00 bills
  - Twenty-seven quarters
  - Forty dimes
  - Sixteen nickels
  - Thirty-five pennies
- Checks for $4.50, $7.75, $9.98
- Freight bill for $55.00
- Credit card sales slips for $65.75
- Cash refund slip for $10.50
- Void sales slip for $4.75
- Cash Register Balance Sheet (provided)

PROCEDURE

Use the following steps to complete a Cash Register Balance Sheet.

1. Fill in the store name/number, if it isn't printed on the form.
2. Write in the date and time the register closed.
3. Fill in your employee number or initials.
4. Fill in the register number.
5. Enter the amount of change fund.
6. Obtain detail audit tape or register readings from manager.
7. Record total amount of sales.
8. Calculate the gross total of money handled during the day. (#5 Change Fund + #7 Sales)
9. Record voids as appropriate.
10. Post refunds as appropriate.
11. Record paidouts as appropriate.
12. Post credit sales.
13. Calculate and enter total credit items. (#9 Void + #10 Refunds + #11 Paidouts + #12 Credit Sales)
14. Calculate and post net cash. (#8 Gross total - #13 Credit items total)
15. Record coins by denomination.
16. Enter bills by denomination.
17. Post the total of the checks.
18. Calculate total cash and checks. (#15 Coins + #16 Currency + #17 Checks)
19. Calculate the cash over or short by finding the difference between the total Cash On Hand and the Net Cash Required. If the Total Cash On Hand is:
    a. More than the Net Cash Required, you are over.
    b. Less than the Net Cash Required, you are short.

20. Circle **Over** or **Short** as appropriate.

21. Sign the Cash Register Balance Sheet.

22. Get manager or supervisor approval.

23. Turn in money and completed form to manager or head cashier.

DIRECTIONS Close out Register 1 and record your findings on the form below.

CASH REGISTER BALANCE SHEET

Store ______
Date ______
Time ______
Employee ______
Reg. No. ______

Change Fund (Bank) ______
Sales (Audit Tape) ______
Gross Total ______

LESS:
Voids ______
Refunds ______
Paid-Outs ______
Credit Sales ______
Total ______

NET CASH REQUIRED ______

Money (Denominations):

Coins
Pennies ______
Nickels ______
Dimes ______
Quarters ______
Halves ______

Currency
$20 ______
$10 ______
$ 5 ______
$ 1 ______
Checks ______
Food Stamps ______

TOTAL CASH ON HAND ______

CASH OVER/SHORT ______
(Circle One)

______
Cashier's Signature

______
Approved by

JOB SHEET 1

Correct register errors.

Student's name ______________________ Date __________

Evaluator's name ______________________ Attempt no. _____

Instructions: When you are ready to perform this task, ask your instructor to observe the procedure and complete this form. All items listed under "Process Evaluation" must receive a "Yes" for you to receive an overall performance evaluation.

PROCESS EVALUATION

Evaluator note: Write a check mark in the "Yes" or "No" blanks to designate whether or not the student has satisfactorily achieved each step in this procedure. If the student is unable to achieve this competency, have the student review the materials and try again.

The student:	YES	NO
1. Told the customer about the error and explained how it would be corrected.	_____	_____
2. Used the appropriate keying sequence to correct the overring, underring and void.	_____	_____
3. Completed the appropriate forms.	_____	_____
4. Obtained management approval.	_____	_____
5. Completed the sale in a timely manner.	_____	_____
6. Corrected the customer's sales receipt.	_____	_____
7. Maintained the customer's goodwill.	_____	_____

EVALUATOR'S COMMENTS

____

____

____

PRODUCT EVALUATION

Evaluator note: Rate the student on the following criteria by circling the appropriate numbers. Each criterion must receive a rating of "3" or higher to demonstrate student mastery. (See performance evaluation key). A student who is unable to demonstrate mastery should review the material and submit another product for evaluation.

Criteria:

4 Using Register	3	2	1
4 Completing Documents	3	2	1
4 Maintaining customer goodwill	3	2	1

EVALUATOR'S COMMENTS

AVERAGE RATING

Evaluator note: To obtain an average rating for the competency profile, total the designated points in "Product Evaluation" and divide by the total number of criteria. Circle the rating on the "Performance Evaluation Key" below.

PERFORMANCE EVALUATION KEY

4 - Skilled—Can perform job with no additional training

3 - Moderately skilled—Has performed job during training program; limited additional training may be required

2 - Limited skill—Has performed job during training program; additional training is required to develop skill

1 - Unskilled—Is familiar with process; but is unable to perform job

PRACTICAL TEST 2 — USING THE CASH REGISTER — VII

JOB SHEET 2

Complete cash and credit card refunds.

Student's name ______________________ Date __________

Evaluator's name ______________________ Attempt no. _____

Instructions: When you are ready to perform this task, ask your instructor to observe the procedure and complete this form. All items listed under "Process Evaluation" must receive a "Yes" for you to receive an overall performance evaluation.

PROCESS EVALUATION

Evaluator note: Write a check mark in the "Yes" or "No" blanks to designate whether or not the student has satisfactorily achieved each step in this procedure. If the student is unable to achieve this competency, have the student review the materials and try again.

The Student:	YES	NO
1. Treated the customer respectfully and tactfully.	_____	_____
2. Asked for a sales receipt.	_____	_____
3. Determined whether the transactions was a cash refund or credit card refund.	_____	_____
4. Completed a Refund Slip or Credit Card Credit Slip, as appropriate.	_____	_____
5. Performed the appropriate keying sequence on the register.	_____	_____
6. Gave the customer the cash amount of the refund or the customer copy of the Credit Card Credit Slip, as appropriate.	_____	_____
7. Stapled the refund documents and placed them in the drawer.	_____	_____
8. Performed steps in a timely manner.	_____	_____

EVALUATOR'S COMMENTS

____

____

____

PRODUCT EVALUATION

Evaluator note: Rate the student on the following criteria by circling the appropriate numbers. Each criterion must receive a rating of "3" or higher to demonstrate student mastery. (See performance evaluation key). A student who is unable to demonstrate mastery should review the material and submit another product for evaluation.

Criteria:

4 Completing Refund Documents	3	2	1
4 Using register	3	2	1
4 Customer Contact	3	2	1

EVALUATOR'S COMMENTS

AVERAGE RATING

Evaluator note: To obtain an average rating for the competency profile, total the designated points in "Product Evaluation" and divide by the total number of criteria. Circle the rating on the "Performance Evaluation Key" below.

PERFORMANCE EVALUATION KEY

4 - Skilled--Can perform job with no additional training

3 - Moderately skilled--Has performed job during training program; limited additional training may be required

2 - Limited skill--Has performed job during training program; additional training is required to develop skill

1 - Unskilled--Is familiar with process; but is unable to perform job

JOB SHEET 3

Bag merchandise.

Student's name ______________________ Date __________

Evaluator's name ______________________ Attempt no. _____

Instructions: When you are ready to perform this task, ask your instructor to observe the procedure and complete this form. All items listed under "Process Evaluation" must receive a "Yes" for you to receive an overall performance evaluation.

PROCESS EVALUATION

Evaluator note: Write a check mark in the "Yes" or "No" blanks to designate whether or not the student has satisfactorily achieved each step in this procedure. If the student is unable to achieve this competency, have the student review the materials and try again.

The Student:	YES	NO
1. Placed only one layer of canned goods on bottom of sack.	_____	_____
2. Placed heavy items at the bottom of the bag.	_____	_____
3. Placed "square" items along the sides of bags.	_____	_____
4. Protected glass items from being broke.	_____	_____
5. Placed fragile and/or easily crushed items at the top.	_____	_____
6. Separated soft goods from hard goods.	_____	_____
7. Separated and placed cold items together.	_____	_____
8. Separated toxic items from edibles.	_____	_____
9. Checked liquid items for leaks.	_____	_____
10. Ensured lids were tight before sacking.	_____	_____
11. Used filler items to make the bag a solid package.	_____	_____
12. Ensured bags were not too heavy or might rip open.	_____	_____
13. Used bags efficiently.	_____	_____
14. Handled merchandise with care, respect.	_____	_____

EVALUATOR'S COMMENTS

____

____

____

PRODUCT EVALUATION

Evaluator note: Rate the student on the following criteria by circling the appropriate numbers. Each criterion must receive a rating of "3" or higher to demonstrate student mastery. (See performance evaluation key). A student who is unable to demonstrate mastery should review the material and submit another product for evaluation.

Criteria:

4 Handling merchandise	3	2	1
4 Packing items	3	2	1
4 Using sacks efficiently	3	2	1

EVALUATOR'S COMMENTS

AVERAGE RATING

Evaluator note: To obtain an average rating for the competency profile, total the designated points in "Product Evaluation" and divide by the total number of criteria. Circle the rating on the "Performance Evaluation Key" below.

PERFORMANCE EVALUATION KEY

4 - Skilled--Can perform job with no additional training
3 - Moderately skilled--Has performed job during training program; limited additional training may be required
2 - Limited skill--Has performed job during training program; additional training is required to develop skill
1 - Unskilled--Is familiar with process; but is unable to perform job

JOB SHEET 4

Key a basic sales transaction.

Student's name ______________________ Date __________

Evaluator's name ______________________ Attempt no. _____

Instructions: When you are ready to perform this task, ask your instructor to observe the procedure and complete this form. All items listed under "Process Evaluation" must receive a "Yes" for you to receive an overall performance evaluation.

PROCESS EVALUATION

Evaluator note: Write a check mark in the "Yes" or "No" blanks to designate whether or not the student has satisfactorily achieved each step in this procedure. If the student is unable to achieve this competency, have the student review the materials and try again.

The Student:	YES	NO
1. Checked register area for readiness.	____	____
2. Greeted the customer.	____	____
3. Asked: "Will this be cash or charge?"	____	____
4. Keyed in merchandise.	____	____
5. Ensured all items are recorded.	____	____
6. Checked merchandise that could conceal items inside.	____	____
7. Subtotaled and added correct sales tax.	____	____
8. Identified total to customer.	____	____
9. Accepted cash payment, put cash received where it was visible.	____	____
10. Made correct change; counted change back to customer starting with amount of sale.	____	____
11. Placed the money in the drawer and closed it; placed large bills under tray.	____	____
12. Placed merchandise in appropriate size sack.	____	____
13. Folded top of sack over, stapled receipt in center and stapled each side.	____	____
14. Handed the customer the package, and said: "Thank you for shopping at Discount Agri Supply."	____	____
15. Locked the register.	____	____
16. Performed steps in a timely manner.	____	____
17. Was courteous to customer.	____	____
18. Cleaned work area.	____	____

PRODUCT EVALUATION

Evaluator note: Rate the student on the following criteria by circling the appropriate numbers. Each criterion must receive a rating of "3" or higher to demonstrate student mastery. (See performance evaluation key). A student who is unable to demonstrate mastery should review the material and submit another product for evaluation.

Criteria				
Using Register	4	3	2	1
Handling Merchandise	4	3	2	1
Customer Contact	4	3	2	1

EVALUATOR'S COMMENTS

____

____

____

AVERAGE RATING

Evaluator note: To obtain an average rating for the competency profile, total the designated points in "Product Evaluation" and divide by the total number of criteria. Circle the rating on the "Performance Evaluation Key."

PERFORMANCE EVALUATION KEY

4 - Skilled -- Can perform job with no additional training

3 - Moderately Skilled -- Has performed job during training program, limited additional training may be required

2 - Limited Skill -- Has performed job during training program; additional training is required to develop skill

1 - Unskilled -- Is familiar with process, but is unable to perform job

USING THE CASH REGISTER

JOB SHEET 5

Balance and/or close out a register.

Student's name ______________________ Date __________

Evaluator's name ______________________ Attempt no. _____

Instructions: When you are ready to perform this task, ask your instructor to observe the procedure and complete this form. All items listed under "Process Evaluation" must receive a "Yes" for you to receive an overall performance evaluation.

PROCESS EVALUATION

Evaluator note: Write a check mark in the "Yes" or "No" blanks to designate whether or not the student has satisfactorily achieved each step in this procedure. If the student is unable to achieve this competency, have the student review the materials and try again.

The Student:	YES	NO
1. Filled in store number, date, time, employee initials and register no.	____	____
2. Entered amount of beginning change fund.	____	____
3. Obtained register audit tape or sales reading.	____	____
4. Recorded amount of sales correctly.	____	____
5. Calculated the gross total of money handled correctly.	____	____
6. Recorded voids.	____	____
7. Posted refunds correctly.	____	____
8. Recoroed paidouts.	____	____
9. Calculated and posted credit sales correctly.	____	____
10. Calculated and entered total credit items.	____	____
11. Calculated and posted net cash.	____	____
12. Counted and recorded coins correctly by denomination.	____	____
14. Posted the total of checks correctly.	____	____
15. Determined whether register **balanced** or was **over/short.**	____	____
16. Made up an opening change fund.	____	____
17. Signed the form.	____	____
18. Obtained supervisor's approval.	____	____
19. Turned in money and completed form to supervisor.	____	____
20. Completed form in a legible manner.	____	____

EVALUATOR'S COMMENTS

____

____

____

PRODUCT EVALUATION

Evaluator note: Rate the student on the following criteria by circling the appropriate numbers. Each criterion must receive a rating of "3" or higher to demonstrate student mastery. (See performance evaluation key). A student who is unable to demonstrate mastery should review the material and submit another product for evaluation.

Criteria:

Counting money	4	3	2	1
Making calculations	4	3	2	1
Completing form	4	3	2	1

EVALUATOR'S [illegible]

____

____

____

[illegible]

[illegible] note: To obtain an average rating for the competency [illegible] total the designated points in "Product Evaluation" and divide by the total number of criteria. Circle the rating on the "Performance Evaluation Key" below.

PERFORMANCE EVALUATION KEY

4 - Skilled--Can perform job with no additional training

3 - Moderately skilled--Has performed job during training program; limited additional training may be required

2 - Limited skill--Has performed job during training program; additional training is required to develop skill

1 - Unskilled--Is familiar with process; but is unable to perform job

WRITTEN TEST

USING THE CASH REGISTER

VII

NAME ______________________________ SCORE ________

OBJECTIVE 1

Match terms associated with registers and register procedures to their correct definitions. Write the correct letters in the blanks.

____ 1. Amount of money placed in cash register for use during the day

____ 2. Pricing an item in units of more than one

____ 3. Instrument that reads information from the Universal ProductCode (UPC) label; may be built into the counter top or held in the cashier's hand

____ 4. Recording the price of an item on a cash register lower than it should be

____ 5. That which is offered as payment, especially money

____ 6. A machine that indicates the amount of each sale and records the amount of money received; usually has a change drawer and may automatically make change

____ 7. The lowest level of identification of merchandise for inventory management.

____ 8. Recording the price of an item on a cash register higher than it should be

____ 9. A type of electronic cash register wired to a computer that controls all sales charge, COD, layaway, including taxes, etc.) at the point-of-sale

____ 10. Form on which a cashier records errors and money paid out for returns, so that at the end of the day the amount of money in the register will balance with the recorded amount of sales and taxes

a. Scanner

b. Checkout terminal

c. Overring

d. Price-lool-up (PLU)

e. Coder

f. Error over

g. Change fund

h. Stock-keeping-unit

i. Quantity pricing

j. Tender

k. Ledger sheet

l. Cash register

m. Ten-key method

n. Multiple pricing

o. Point-of-scale (POS) terminal

p. Accounting

q. Touch method code (UPC)

r. Universal product

s. Underring

___11. Operating a cash register using specific finger positions for faster speed, rhythm and accuracy

___12. Set of bars and numbers printed on a package to identify the product, manufacturer and price information when scanned a POS system

___13. A feature of POS systems and some electronic cash registers which enables the register to print the current price for each item by means of "scanning" the UPC label and/or keying in the item identification number (SKU)

OBJECTIVE 2

Select from a list guidelines that contribute to a positive shopping experience for each customer. Write an "X" in the blank before each correct answer.

____ 1. Verify the price of all unticketed merchandise that comes to the checkout.

____ 2. Place the merchandise in the largest sack available.

____ 3. Handle complaints tactfully and courteously.

____ 4. Call for back-up cashiers and/or sackers when you need them.

____ 5. Block off the checkout lane while customers are in line to take a break.

____ 6. Determine the store's policy regarding where to keep the cash register key when not in use.

____ 7. Stop keying if customer interrupts.

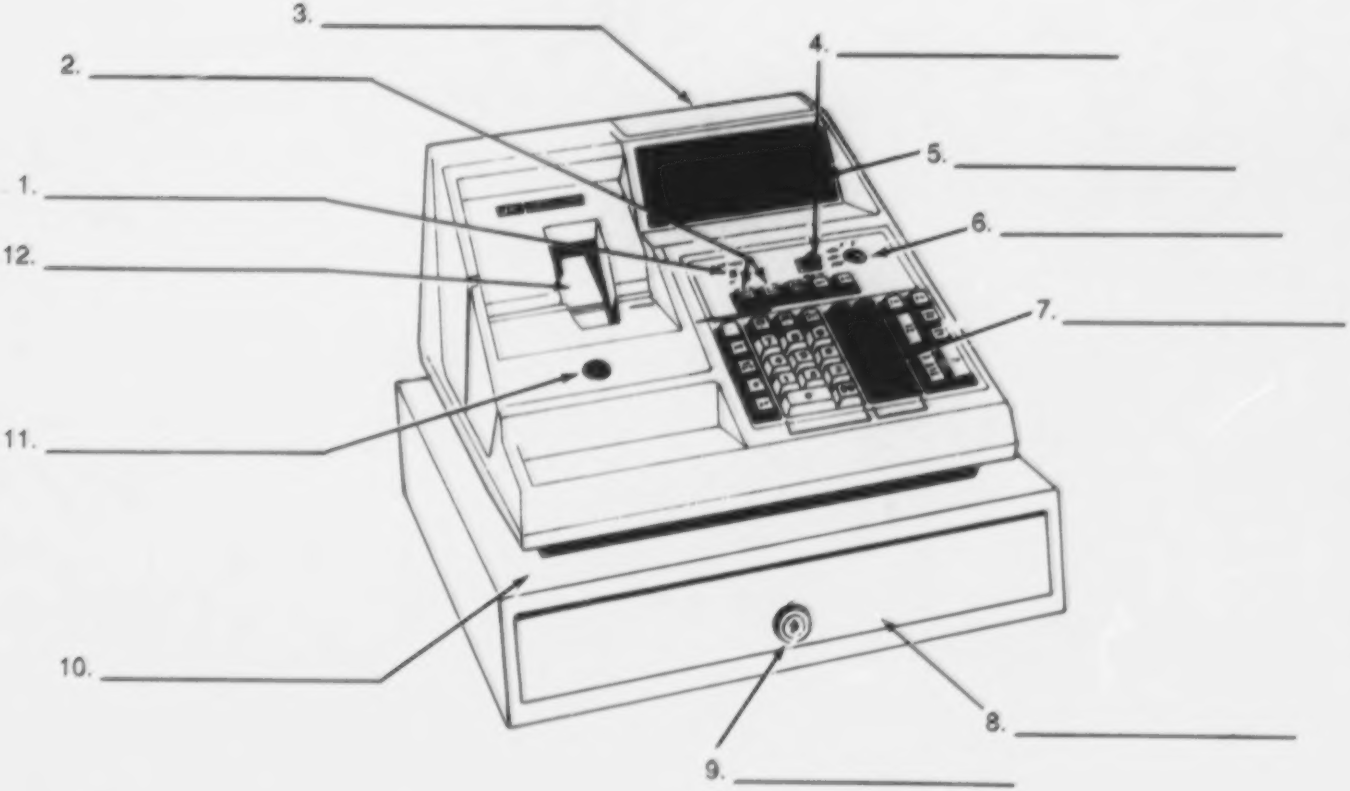
____ 8. Always take the customer's word for a price.

____ 9. Call aloud each price in a clear distinct voice.

___ 10. Record each item and sale separately.

Parts of a Cash Register

OBJECTIVE 3 | **Label the parts of a register.** Label the parts of the cash register by writing the correct names in the blanks.



OBJECTIVE 4

List the advantages of using the touch method of keying. Write the answers in the space provided.

OBJECTIVE 5

List the guidelines for correct body and hand position while keying at the register. Write four guidelines in the space provided.

OBJECTIVE 6

Match fingers with the groups of keys they press. Write the correct letters in the blanks.

____ 1. Little

____ 2. Index

____ 3. Thumb

____ 4. Ring

____ 5. Middle

a. 0 (zero)

b. 3, 6, 9 and ERR CORR

c. 1, 4, 7 and CLR

d. 2, 5, 8 and @/FOR

e. Dept. keys, CASH, SBTL, CHEK and CHRG

OBJECTIVE 7

Name the home keys. Write the the names of the home keys in the space below.

____

____

____

____

OBJECTIVE 8

Match function keys to their functions. Write the letters in the blanks provided.

____ 1. Used to void an entry which has just been keyed

____ 2. Used to display the total amount due on a sale

____ 3. Used to perform a payment made by charge

____ 4. Used to erase an error condition and/or to clear a partial entry from the display

____ 5. Used for multiplication of entries and split pricing

____ 6. Used to finalize sales by payments in checks

____ 7. Used to perform a payment made with cash

____ 8. Used to record items of merchandise that are sold by specific store sections

a. Department keys

b. Tax exemption

c. Cash

d. No sale

e. Check

f. Clear

g. Error correct

h. Manual tax

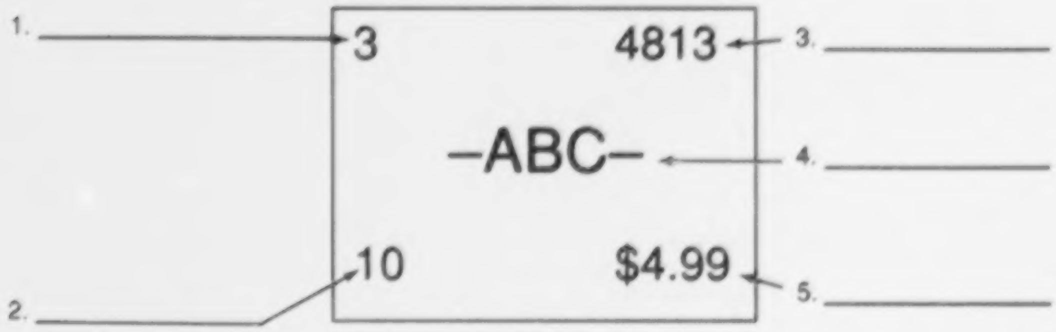
i. Clerk

j. Charge

k. Quantity Extension

l. Subtotal

OBJECTIVE 9 | **Label parts of a price ticket.**


1.
3
4813
3.
-ABC-
4.
10
$4.99
2.
5.

OBJECTIVE 10 | **List common register errors.**

OBJECTIVE 11

State guidelines for handling exchanges, refunds and defectives. Write three guidelines in the space provided.

____

____

____

____

____

____

____

____

____

____

____

____

OBJECTIVE 12

Arrange in order the steps for counting the change fund. Write a "1" in the blank before the first step, a "2" in the blank before the second step and so on.

___ Post the total for the bills.

___ Separate coins and bills by denominations.

___ Sign your name.

___ Return completed form to head cashier.

___ Calculate the total for the coins.

___ Add the Coin Total and Currency Total and post.

___ Get a Change Fund Receipt form from head cashier or your supervisor.

___ Count the bills, entering amounts for the ones, fives, tens and twenties.

___ Put your change fund in the drawer.

___ Write today's date and register number.

___ Count coins and add as individual amounts the totals for pennies, nickels, dimes, quarters and halves.

OBJECTIVE 13 **State guidelines for arranging coins and bills in the cash drawer.** Write three guidelines in the space provided.

____

____

____

____

____

____

____

____

____

____

____

____

____

____

OBJECTIVE 14 **Select from a list guidelines for bagging merchandise.** Write an "X" in the blank before each correct answer.

____ 1. Place damp, cold or frozen items together.

____ 2. Place bleach and ammonia in the same bag.

____ 3. Place easily damaged products on top of sack.

____ 4. Bag clothing with hard goods.

____ 5. Never put soaps or toxic products in with edible items.

____ 6. Place bottles on top of bag.

____ 7. Place heavier items low in the bag.

____ 8. Check each bag to make sure it is not overloaded.

____ 9. Place more than one layer of canned goods on bottom of sack.

___ 10. When packaging, check items for leaks.

OBJECTIVE 15

Select from a list tasks an employee is to perform to prepare the check out for business. Write an "X" in the blank before each correct answer.

____ 1. Count the change fund, fill out Change Fund Receipt and put change fund in cash drawer.

____ 2. Leave the dusting and cleaning to the maintenance people.

____ 3. Ensure you have enough receipt and journal paper.

____ 4. Check bag supply; get more of the sizes you need.

____ 5. Dust and straighten the merchandise in your area.

____ 6. Hide the trash behind the check stand.

____ 7. Leave all of the returned items at your check out.

____ 8. Check daily price changes and advertised specials and post them for easy reference.

OBJECTIVE 16

List ways of preventing losses and theft at the checkout. Write eight ways in the space provided.

NOTICE	The following assignment sheet and job sheets are not part of the written test. If these activities have not been completed, check with your instructor.	
OBJECTIVE 17	Identify common register errors.	SCORE ________
OBJECTIVE 18a	Correct register errors.	RATING _______
OBJECTIVE 18b	Complete cash and credit card refunds.	RATING _______
OBJECTIVE 18c	Bag merchandise.	RATING _______
OBJECTIVE 18d	Key a basic sales transaction.	RATING _______
OBJECTIVE 18e	Balance and/or close out a register.	RATING _______

WRITTEN TEST ANSWERS

USING THE CASH REGISTER

VII

OBJECTIVE 1

1. g
2. n
3. a
4. s
5. j
6. l
7. h
8. c
9. o
10. k
11. q
12. r
13. d

OBJECTIVE 2

1, 3, 6, 7, 9, 10

OBJECTIVE 3

1. Receipt on/off switch
2. Receipt/journal feed
3. Customer display
4. Clerk key
5. Display
6. Register on/off key
7. Keyboard
8. Cash drawer
9. Drawer lock
10. Money handling space
11. Printer cover lock
12. Receipt

OBJECTIVE 4

Answer should include:

- Faster
- More accurate
- More efficient
- Improves customer relations

OBJECTIVE 5

Answer should include any four of the following:

- Body slightly left of the keyboard
- Arm extended to reach the keyboard
- Eyes toward the on-coming customer and the merchandise to be keyed
- Fingers curved slightly
- Fingers rest lightly on the keys
- Wrist straight

OBJECTIVE 6

1. e
2. c
3. a
4. b
5. d

OBJECTIVE 7

The homes keys are 4, 5, 6, 0 and Department

OBJECTIVE 8

1. c
2. l
3. j
4. f
5. k
6. e
7. c
8. a

OBJECTIVE 9

1. Dept.
2. Date
3. SKU
4. Company Name
5. Price

OBJECTIVE 10

Answer should include:

- Underrings
- Overrings
- Department errors
- Voids

OBJECTIVE 11

Answer should include any three of the following:

- Customer requesting an exchange or refund are to be treated in the same courteous manner as when the original purchase was made.
- Customers are encouraged to present a sales receipt as proof of purchase; but it is not required.
- Credit card refunds are handled differently than a cash refund.

- Exchanges will be made gladly even if a partial refund if required.
- Follow specific policies regarding "over-the-counter" replacements for defectives.

OBJECTIVE 12 7, 2, 11, 5, 8, 1, 6, 10, 3, 9, 4

OBJECTIVE 13 Answer should include any three of the following:

- Each denomination of coin and currency should go into its respective section.
- Arrange the money with the smaller bills and coins on the right.
- Make sure currency is face-side up, with top of each bill to the left edge of its section.
- Place checks, coupons, and bills over $20.00 under drawer tray.

OBJECTIVE 14 1, 3, 5, 7, 8, 10

OBJECTIVE 15 1, 3, 4, 5, 8

OBJECTIVE 16 Answer should include eight of the following:

- Serve only one customer at a time.
- Never allow customers behind the counter where the register is located.
- Be alert to price switching.
- Do not take the customer's word for a price — call for a price check.
- Never guess at prices or measurements.
- Know how to measure and weigh items.
- Ring items correctly, calling prices for each item.
- Check the bottom of all shopping carts for items.

- Check inside items that could contain hidden merchandise.
- Check for "undeclared" items.
- Open the register only while ringing up a sale.
- Place large denomination bills under the tray.
- Never leave the checkstand to get change. Call for service and have it delivered. Call for change before you run out.
- Do not let an excessive amount of cash build up in your register...call for a "pick-up."
- Never be distracted or bend over with the cash drawer open.
- If you become confused at any time, close the drawer and call the manager.
- Close the drawer before sacking the merchandise.
- Lock the register when not in use.
- Close unused checkouts with a chain or shopping cart so customers will have to pass another cashier on their way out.

OBJECTIVE 17 Refer to answers to Assignment Sheet 1.

OBJECTIVE 18 Refer to Practical Test rating for Job Sheets 1 through 5.

OBJECTIVE SHEET

SELLING AND CUSTOMER SERVICE

VIII

INTRODUCTION

The most crucial contact of all is the first one that the customer makes with your business, because if you lose customers here, they are likely lost forever. In today's business environment, it is imperative that those having initial contact with customers do their utmost to help the customers and make them feel appreciated.

Selling begins long before the customer ever appears, writes, calls, or agrees to see you. It takes a good deal of groundwork to make first contacts successful. Putting the following ideas and techniques to work will help you and those you work with to be successful in selling.

UNIT OBJECTIVE

After completing this unit, the student should be able to complete a basic sales presentation, know how to handle various customers, deal with customer objections, talk about price, handle statements about competitors, and inform customers about warranties.

The student should also know the importance of customer service after the sale. The student will demonstrate these competencies by completing the assignment sheets and written test with a minimum of 85 percent accuracy.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to

1. Match terms associated with sales and service to their correct definitions.
2. List common duties of a salesperson in addition to direct selling.
3. List the characteristics and qualities of a professional salesperson.
4. Arrange in order the steps of a professional sales process.
5. List the kinds of information a salesperson needs to gather during the pre-approach step.
6. List the types of retail sales approaches.
7. List the techniques to use to determine customer wants and needs.
8. Match product features and benefits.

9. State guidelines and opportunities for suggestion selling.

10. Match methods of closing to the appropriate explanation.

11. Select from a list true statements about what to say during a sales presentation.

2. Select from a list true statements about demonstrating merchandise.

13. Select from a list true statements about how to talk about price.

4. Match terms associated with warranties to their correct definitions.

15. Match types of customers to the most effective ways of dealing with them.

16. Match methods of handling customer objections about merchandise to correct descriptive statements.

17. Match common objections relating to time of purchase and/or price to the appropriate method of handling the objection.

18. Discuss how to handle statements about competitors.

19. List sources of prospect's names.

20. List ways to keep customers after the sale.

21. Develop a merchandise, greeting, and service approach for six products or services. (Assignment Sheet 1)

22. Develop leading questions to determine the customer's needs. (Assignment Sheet 2)

23. Distinguish between feature and benefit statements. (Assignment Sheet 3)

24. Write suggestion selling statements. (Assignment Sheet 4)

25. Analyze a sales demonstration. (Assignment Sheet 5)

26. Conduct a sales demonstration. (Assignment Sheet 6)

PREPARATION

- Obtain materials to supplement unit.

  NOTE: See Suggested Resources.

- Review instructional outline for this unit. Modify time frames to suit class needs and plan activities for each class period.

- Study the specific objectives to determine those you will cover in your presentation. Decide also which objectives should be taught to which students.

- Determine scope and sequence of objectives that you add. Design and develop support materials, including evaluation techniques, for additional objectives.

- Determine how you will schedule time for students to demonstrate competence in the required procedures.

- Make arrangements for guest speakers. Supply speakers with specific objectives and other appropriate sections of the unit.

- Prepare classroom.
  - Put up posters, charts, or other items dealing with sales and customer service.
  - Have articles, brochures, and other literature dealing with selling skills available for students.

DELIVERY

Objective 1

- Survey class to find out their perceptions of customers and salespersons. Ask students if they have been ignored by a salesperson. If so, ask students whether they still patronize that store.

- Show the video *Remember Me*.

- Have a manager of an agribusiness discuss the importance of good customer service and the salesperson's role in providing good service.

- Discuss terms and definitions. Provide students with examples to illustrate terms when possible.

Objective 2

- Discuss the various duties of a salesperson in addition to direct selling.

- Point out the following advantages that are a result of the salesperson being involved in the performance of these tasks.

  - Help the salesperson become familiar with the merchandise and with the inventory on hand.

  - Help the customer receive better service from a salesperson who knows the stock.

Objective 3

- Discuss the characteristics and qualities of a professional salesperson.

  NOTE: Point out how important it is for a salesperson to care for what he or she is doing and believe in the products or services.

- Discuss the importance of ethics in business today. Review Supplement 1, Code of Ethics.

- Some key points to touch on regarding ethics are:

  - Salespeople are to be open, honest, and *above* suspicion in all their dealings.

  - Avoid getting business through bribes; giving expensive gifts or lavish entertaining; disclosing confidential information; or conflicts of interest.

- Have an agribusiness manager discuss the characteristics and qualities he or she looks for when hiring a salesperson. Also, discuss the importance of ethics and its role in customer, employer, vendor and competitor relationships.

Objective 4

- Use Transparency Master 1 to discuss the sales process.

- Use one of the following videos as a "lead-in" to the sales process: *Customer Focused Selling*, *Customer Service Selling*, *5 Steps to Successful Selling*, *Basic Retail Selling Skills* or *The Selling Edge*.

Objective 5

- Discuss the kinds of information about customers and products a salesperson needs to gather during the pre-approach step of the sales process.

Objective 6

- Discuss how to secure customer interest and involvement.
- Create a list of products your students sell (or would like to sell). Then develop several greeting, service and merchandise approaches for each item.
- For those students who may be involved in contact selling situations, assist them in developing opening statements for their products or services. Review Supplement 2, Guidelines for Contact Selling.

  NOTE: One of the best ways to get ideas for opening statements is to study the large mail order catalogs.

- Have students complete Assignment Sheet 1.

Objective 7

- Discuss how to determine appropriate products for presentation.
- Develop a list of "clues" that would indicate customer needs in an agribusiness setting.
- Develop examples of open-ended questions.
- Develop some examples of direct questions that could be used to determine customer wants and needs.
- Discuss examples of "summarizing" and "generating alternatives."
- Discuss buying motives and why it is important for a salesperson to be aware of them...and how to use them in the sales process.
- Have students complete Assignment Sheet 2.

Objective 8

- Discuss product features and benefits. Emphasize that sometimes we have to really concentrate to identify the benefits and features in our products.

- Discuss the importance of product knowledge and advantages to the salesperson.

  NOTE: Some advantages to the salesperson are:

  - It builds confidence.
  - It helps overcome sales resistance.
  - It keeps presentations lively.
  - It helps salespeople enjoy their work.
  - It increases their chances for promotion.

- Show the video *Knowing Your Products: Features and Benefits.*

- Discuss opportunities to develop product knowledge.

  EXAMPLES: When putting up stock, pricing merchandise, talking to customers, reading the newspaper, shopping competition, etc.

- Develop a list of features and benefits for products suggested by students. List them on the chalkboard. Then discuss how to relate them to the customer's needs as determined in the previous step of the sales process (Objective 7).

- Have students complete Activity Sheet 1.

- Have students complete Assignment Sheet 3.

Objective 9

- Discuss the importance of suggestion selling.

  EXAMPLES: It enhances the value of the initial purchase, satisfies additional wants and needs related to the initial purchase, saves the customer time and money

- Have students complete Assignment Sheet 4.

- Using the items and suggestion selling statements listed on Assignment Sheet 4, provide the students with an opportunity to practice their suggestion selling skills in a role-play situation.

Objective 10

- Discuss helping customers make buying decisions.
- Develop a list of both verbal and non-verbal buying signals.
- Develop some additional examples of the various types of close. Discuss when each type of close would be appropriate.

Objective 11

- Discuss what to say during a sales presentation. Provide additional examples for each of the key points.

Objective 12

- Discuss demonstrating merchandise.
- Have students complete Activity Sheet 2. Then, let them practice their skills in a role-play situation.

Objectives 13 and 14

- Discuss how to talk about price.
- Discuss terms associated with warranties. Review Supplement 3, Warranty Guidelines.

Objective 15

- Discuss ways to recognized and help various types of customers. Provide examples and/or sample statements.
- Have students complete Activity Sheet 3 and share their ideas/answers with the other students.

Objectives 16 and 17

- Discuss handling customer objections. Review Supplement 4, Guidelines for Handling Objections.
- Have students complete Activity Sheet 4.
- Give students an opportunity to practice handling objections in a role-play situation.

Objective 18

- Discuss how to handle statements about competitors.

Objective 19

- Discuss sources of prospects' names.
- Have a professional agribusiness salesperson discuss the techniques associated with prospecting, developing and qualifying leads, making the initial contact, setting appointments, and cold canvassing.

Objective 20

- Discuss ways to keep customers after the sale.
- Have a professional salesperson discuss his or her methods of keeping customers after the sale.
- Have students create a list of people/firms that utilize the principles discussed in this section.

APPLICATION

Objective 21

- Use Assignment Sheet 1 to give students practice in developing a merchandise, greeting, and service approach for products or services.

Objective 22

- Use Assignment Sheet 2 to give students practice in developing leading questions to determine the customers' needs.

Objective 23

- Use Assignment Sheet 3 to give students practice in distinguishing between feature and benefit statements.

Objective 24

- Use Assignment Sheet 4 to give students practice in writing suggestion selling statements.

Objective 25

- Use Assignment Sheet 5 to give students practice in analyzing a sales demonstration.

Objective 26

- Use Assignment Sheet 6 to teach students how to conduct a sales demonstration.

- Have students critique each other's sales demonstration when doing Assignment Sheet 6.

EVALUATION

Written Test

- Explains to students that they will be asked to demonstrate on the written test actions listed in the specific objectives.
- Give written test.

  NOTE: The written test may be given in sections if desired.
- Evaluate students on assignment sheet activities if not previously done.
- Reteach and retest if necessary.
- Complete appropriate section of competency profiles.
- Review individual and group performance in order to evaluate teaching methods. Adjust scope, sequence, or instructional approaches for additional lessons as required.

SUGGESTED RESOURCES

Audiovisual Materials

- *Customer Focused Selling*, Color, 1/2" VHS, Advantage Media, Inc., 1987. Available from Advantage Media, Inc., 21601 Marilla St., Chatsworth, CA 91311, 818-700-0504.

  This program introduces the five-step process involved in customer focused selling: the greeting, qualifying the customer, presenting the merchandise, overcoming objections, and closing and add-on sales.
- *Customer Service Selling*, Color 1/2" VHS, 16 minutes, Advantage Media, Inc., 1987, available from Advantage Media, Inc., 21601 Marilla St., Chatsworth, CA 91311, 818-700-0504.

  This video emphasizes that the success of a retail company is entirely dependent on retail salespeople and the quality of customer service they provide. Salespeople can use it to analyze selling situations and to identify ways to increase sales. Greeting, discovering customer needs, presenting the merchandise, handling customer indecision, closing the sale and add-ons are the five steps discussed.

- *Top Gun Challenge*, color, 1/2" VHS, 11 minutes, NVC Films, 1986. Available from NVC Films, 31 Locust Point Road, Locust, NJ 07760, 201-291-4200.

  Top gun, the Navy's graduate-level course in air combat and fighter tactics, provides the base for this excitingly different, motivational video. Top gun pilots suggest techniques which should help competitors at all levels plan and implement effective battle plans for today's competitive marketplace.

  NOTE: The above videos are available to Oklahoma teachers on a free-loan basis. Oklahoma teachers may order this video from the Oklahoma Department of Vocational and Technical Education, Resource Center, ATTN: Instructional Media Specialist, 1500 West Seventh Avenue, Stillwater, OK 74074-4364, 1-800-522-5810. Out-of-state teachers must order from the addresses listed with the video.

- *Basic Retail Selling Skills*, color, 1/2" VHS, 26 minutes, American Media Incorporated, Available from American Media Incorporated, 1454 30th Street, West Des Moines, IA 50265, 1-800-262-2557. The narrator takes a step-by-step approach to describing the key points of selling in a retail setting. Contains three parts: appearance, talking to the customer, and closing the sale.

- *5 Steps to Successful Selling*, color, 1/2" VHS, 81 minutes, The Zig Ziglar Corporation, Available from The Zig Ziglar Corporation, 3330 Earhart, Suite 204, Carrollton, TX 75006 1-800-527-0306. This entertaining video seminar teaches Zig's five steps to becoming a top performer. Topics covered are: Build your self image, prospecting, presentation skills, "how-tos" of closing and follow-up after the sale.

- *Selling Edge*, color, 1/2" VHS, 40 minutes, Dyna-Com Resources Inc. Available from Dyna-Çom Resources Inc., 8120 West Baker Avenue, Lakewood, CO 80227, 1-303-986-9144. This is a retail-specific sales skills development program. Topics include: Introduction and Approach, Recognizing Wants and Needs, Features and Benefits, Suggestion Selling, Closing, Putting It All Together.

- *Remember Me*, color, 1/2 VHS, 28 minutes, CRM/McGraw-Hill Films 1980. Available from McGraw-Hill Training Systems, P.O. Box 641, Del Mar, California 92014-9988, 1-619-453-5000.

- *Take Care*, color, 1/2" VHS, American Media Incorporated, Available from American Media Incorporated, 1454 30th Street, West Des Moines, IA 50265, 1-800-262-2557. This program teaches the techniques that create satisfied customers *who will return*. Key training points are: How to implement excellent customer relations; how to find out your customer's wants, and needs; how to handle irate customers; how to have better telephone customer relations; and how to get organized.

Publications

- Ernest, John W., and Richard D. Oshmun, *Selling Principles and Practices*, 5th ed., Gregg Division, McGraw-Hill, Inc., New York, 1980.
- LeBoeuf, Michael, *How to Win Customers and Keep Them for Life*, G. P. Putnam's Sons, New York, 1987.
- Wingate, John W. and Carroll O. Nolan, *Fundamentals of Selling*, 10th ed., South-Western Publishing Co., Cincinnati, 1976.

UNIT REFERENCES

- *Distributive Education II*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1976.
- Ernest, John W., and Richard D. Ashmum, *Selling Principles and Practices*, 5th ed. Gregg Division, McGraw-Hill, Inc., New York, 1980.
- LeBoeuf, Michael, *How to Win Customers and Keep Them for Life*, G. P. Putnam's Sons, New York, 1987.
- *Selling Edge*, Dyna-Com Resources Inc. Lakewood, Colorado, 1985.
- Wingate, John W. and Carroll A. Nolan, *Fundamentals of Selling*, 10th ed., South-Western Publishing Co., Cincinnati, 1976.

BASIC SKILLS

The following table identifies the basic academic skills that are reinforced in this unit of instruction. These basic academic skills were identified using *The Basic/Essential Skills Taxonomy*, 2nd ed. and verified during the validation process.

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 1	Language Arts 013	Applies/Uses	Definitions	
	Free Enterprise 006	Defines	Economic terms	
OBJECTIVE 2	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 3	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 4	Science 037	Applies/Uses	Classification schemes	
OBJECTIVE 5	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 6	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 7	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 8	Language Arts 013	Applies/Uses	Definitions	
	Science 466	Identifies	Definitions	
OBJECTIVE 9	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 10	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 11	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 12	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 13	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 14	Free Enterprise 003	Defines	Economic terms	
OBJECTIVE 15	Language Arts 013	Applies/Uses	Definitions	
	Language Arts 124	Comprehends	Information-oral	Character traits
	Language Arts 229	Identifies	Information-written	Stereotypes
	Language Arts 256	Infers/ Predicts	Information-written	Outcomes/ solutions
	Language Arts 231	Identifies	Purpose/ strategy	
OBJECTIVE 16	Language Arts 013	Applies/Uses	Definitions	
	Language Arts 231	Identifies	Purpose/ strategy	
OBJECTIVE 17	Language Arts 013	Applies/Uses	Definitions	
	Language Arts 231	Identifies	Purpose/ strategy	
OBJECTIVE 18	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
OBJECTIVE 19	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	

564

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 20	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 21	Language Arts 035	Attends	Directions/ task	
	Math 229	Solves problems	Generate conclusions	Deductive reasoning
	Language Arts 166	Describes/ Explains	Purpose/ strategy	Word groups
	Language Arts 156	Describes/ Explains	Language situations	Audience
	Language Arts 157	Describes/ Explains	Language situations	Purpose
	Language Arts 071	Composes/ Edits	Oral presentations	
	Language Arts 159	Describes/ Explains	Perceptual effects	
OBJECTIVE 22	Language Arts 071	Composes/ Edits	Oral presentations	
	Language Arts 157	Describes/ Explains	Language situations	Purpose
	Language Arts 035	Attends	Directions/ task	
OBJECTIVE 23	Language Arts 013	Applies/Uses	Definitions	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 24	Language Arts 169	Evaluates	Information-oral	Appropriateness
	Language Arts 170	Evaluates	Information-oral	Clarity
	Language Arts 174	Evaluates	Information-oral	Propaganda techniques
OBJECTIVE 25	Language Arts 071	Composes/ Edits	Oral presentation	
	Language Arts 270	Presents	Informal speech	Persuasive

INFORMATION SHEET

SELLING AND CUSTOMER SERVICE VIII

OBJECTIVE 1

Match terms associated with sales and service to their correct definitions.

- **Buying motives**—Reasons people buy products or services
- **Caveat emptor**—A Latin term which means, "let the buyer beware," implying that the purchase is made at the buyer's own risk
- **Cold canvassing**—A method of selling where the salesperson makes as many calls as possible without any preliminary investigation
- **Commission**—The practice of paying a salesperson a percentage of his or her sales
- **Endless chain method**—A process of securing names of prospects from everyone the salesperson calls on
- **Fairness in pricing**—A practice that ensures customers receive good merchandise value for their money, usually associated with a one price policy
- **Misrepresentation**—The practice of giving false or misleading information about merchandise to make the merchandise more appealing and to lure customers into buying
- **Never-out list**—A stock-control system (sometimes called a *checklist*) which identifies items that are to be "in-stock" at all times
- **One price policy**—A policy adopted by most retailers that ensures all customers that at any given time they will be charged the same price for the same merchandise and that the seller will not discriminate in favor of certain customers
- **Pre-approach**—Preparations for selling
- **Referred leads**—People upon whom a salesperson can call with some form of introduction from a friend/acquaintance
- **Salary**—Predetermined amount of pay
- **Sales quota**—Goals or assignments either in dollars or units for a specific period of time

- **Switching**—The practice of advertising a product at a very low price and then making an effort to switch the customer who responds to more expensive merchandise

  NOTE: Advertising merchandise at a very low price and then not having it available and trying to sell higher priced merchandise to a customer is not only unethical, but also a poor marketing practice.

OBJECTIVE 2

List common duties of a salesperson in addition to direct selling.

- Arranging display fixtures
- Keeping stock ready to sell

  EXAMPLE: Priced, displayed, coordinated with advertisements and promotions
- Maintaining stock records

  EXAMPLE: Want slips, "Never-out" lists, perpetual inventory, reorder slips, slow-selling lists
- Learning about merchandise
- Checking competition
- Understanding stock room arrangements and operations
- Keeping selling area neat and clean
- Handling customer complaints
- Handling returns and refunds
- Controlling merchandise shortages

  EXAMPLES: Paper work errors, shoplifting, pilferage, damage, etc.
- Wrapping merchandise
- Taking inventory
- Attending store meetings

OBJECTIVE 3

List the characteristics and qualities of a professional salesperson. (Supplement 1)

Before anyone can utilize their knowledge and skills in selling, a favorable first impression must be made on the customer. In a matter of only a few seconds, the salesperson must convince the customer he or she is someone with whom the customer will *enjoy* doing business. This favorable initial contact depends upon the salesperson's personality.

Personality is the sum of a person's physique, character, attitudes and habits; it is the sum of how a person appears and what he or she does in his or her relationships with others.

Characteristics

- Physical characteristics
  - Is healthy
  - Has good posture
  - Practices good grooming
  - Wears appropriate clothing
  - Has mannerisms which are appropriate
- Speaking characteristics
  - Uses appropriate vocabulary
  - Uses correct grammar
  - Displays good use of terms and expressions
  - Uses correct pronunciation and enunciation
- Moral qualities
  - Displays honesty
  - Is responsible
  - Is courageous
  - Is loyal

  - Is industrious
  - Is diligent
  - Is ethical
- Intellectual Qualities
  - Is resourceful
  - Is imaginative
  - Is ambitious
  - Is adaptable
- Social Qualities
  - Is observant
  - Is enthusiastic
  - Is confident
  - Is courteous and tactful
  - Is sympathetic and empathetic

OBJECTIVE 4

Arrange in order the steps of a professional sales process. (Transparency Master 1)

1. Pre-approach – Time spent gathering information about your customers, products, business and competitors.
2. Approach – Statements made to secure your customer's interest and involvement.
3. Recognize wants and needs – Techniques used to determine the appropriate products for presentation.
4. Overview benefits – Ways to convert product features to benefits and then relate those benefits to the customer's needs.
5. Suggestion selling – Way to better serve customer's needs and build sales.
6. Closing – Methods of helping customers make buying decisions.

OBJECTIVE 5

List the kinds of information a salesperson needs to gather during the pre-approach step.

NOTE: Customer and product information are important for all salespeople, especially for those who must search for prospective customers outside a store setting, such as industrial salespersons, wholesalers, distributors, and manufacturers' representatives.

- Information needed about a customer
  - Name, address, business
  - Prospect's buying policies
  - Prospect's buying problems
  - Buying hours or time when customer is best able to work with a salesperson
  - Who makes the decision to purchase
  - Family
  - Likes, dislikes, things in common with salesperson
- Information needed about your product and business
  - Stock locations
  - Company policies
  - Knowledge of brands, colors, sizes
  - Other important product information
  - Delivery dates
  - Comparison with competitors' products
  - How to care for the products, special handling, special protection, etc.

OBJECTIVE 6 **List the types of retail sales approaches.** (Supplement 2)

Use the following approaches to secure customer interest and involvement.

There are three types of *retail sales* approaches.

- **Greeting approach**—Since customers hear this approach less frequently, it is a good one to make your customer feel welcomed in your store.

  EXAMPLES: "Good Morning," "Good Afternoon," "I'll be right with you."

- **Service approach**—This is the traditional "May I help you?" approach and of the three is least desirable. However, here are some situations where the service approach is appropriate:

  - A customer looks confused.
  - There are a large number of customers in the store.
  - When a customer has completed shopping and is ready to "check out."

- **Merchandise approach**—This is the most effective and professional approach.

  NOTE: Merchandise approaches stimulate interest in the merchandise, invite conversation and creates a favorable impression.

Merchandise approaches usually point out some unique characteristics, feature or benefit of an item.

EXAMPLES: "Aren't those pretty – those colors are big this season."
"Did you know those are reversible?"

OBJECTIVE 7 **List the techniques to use to determine customer wants and needs.**

Use these techniques to determine the appropriate products to present to your customers:

- **Listen**

  Listen intently to your customer. Quite often the customer will give clues which will indicate his or her needs. He or she may mention a project, problem, concern, etc. that may give you clues to his or her true needs.

Maintain good eye contact and watch for non-verbal clues such as a smile, frown or other gestures.

- **Use questioning skills**
  - **Open-ended** questions are the most powerful tools you have in determining your customers wants and needs. They begin with words such as what, how, who, when, where, and why.

EXAMPLE: "What did you have that you wanted to use it with?"

NOTE: Avoid questions regarding price at first.

  - **Direct** questions call for specific responses and may be answered with a "yes," "no," or a short and specific response.

EXAMPLE: "Are you looking for an herbicide?"

- **Summarize your understanding of the customer's needs.**

To check your understanding of the customer's, needs, repeat back your understanding of what you believe he or she is trying to communicate. Making a false assumption can lead to frustration and a loss of time.

EXAMPLE: "So you are looking for a product that will kill the weeds and fertilize your lawn."

- **Generate alternatives**

Posing alternatives to your customer can be helpful in determining his or her needs.

EXAMPLE: "We have an excellent selection of push and riding mowers, which would you like to see first?"

OBJECTIVE 8 **Match product features and benefits.** (Activity Sheet 1)

There is no area of selling more important or more misunderstood than the subject of product features and benefits.

- Product features are facts about merchandise we can all agree on such as, cordless, 18 horsepower, kit form, etc.

Features themselves mean very little to a customer unless they are converted to benefits such as saves time, saves work, saves money, gives comfort, etc. Customers do *not* buy features; they buy benefits.

In order to effectively convey features and benefits to your customers, you must have adequate product knowledge. Product knowledge information is very plentiful and readily available. The most readily available sources are:

- Merchandise, tags, labels, warranties, operating manuals, boxes, catalogs
- Government publications, testing bureau publications, trade association journals and professional magazines.

EXAMPLES: Consumer reports, *Progressive Farmer*, *Quarterhorse Journal*, *Mother Earth News*.

Regular magazines, newspaper advertisements, tabloids (often called "tabs")

- Other salespeople, buyers, sales representatives and customers

Remember, your customers do not buy features, they buy benefits. A *benefit* statement tells the customer what the product or product's features will do for him or her. A good way to translate features into benefits is by using the six magic words, "What this means to you is..."

EXAMPLE: "This drill is cordless/rechargeable and **what this means to you is**, it goes anywhere, it's convenient to use and requires less maintenance."

- Convenience, durability, and cost savings are benefits.

Here is a list of a few products and features, along with their corresponding benefits:

Products and Features	**Benefits**
Electric drill	
• Cordless/rechargeable	• Goes anywhere
• Heavy duty	• Less maintenance
• Wall mount recharger	• Convenient
	• Saves space
Riding Mower	
• 17 inch turning radius	• Weaves easily between trees, sandboxes and swing sets
• Transmission mounted disk brake	• Smooth, dependable stops
• Cast iron cylinder liner dependability	• Long life, rugged

Products and Features	Benefits
Cage and Table Dryer	
• Polyethylene housing	• Easy to clean and disinfect
• Totally enclosed motor	• Safe
• Variable temperature control	• Won't clog with hair: quiet and powerful
	• Adjusts to suit the task
Hydraulic Cattle Chute	
• Separate compact power source	• Eliminates noise
• One quarter circle tailgate	• Safer for man and animal
• Controls mounted on frame	• Convenience; easy to operate
Horse Farm Management Software	
• Inventory lists horses by type, sex, age, etc	• Up-to-date information
	• Saves time
• Schedules procedures	• Allows you to make sound management decisions
• Breeding reports	
• Owner billing	• Improves cash flow

OBJECTIVE 9 **State guidelines and opportunities for suggestion selling.**

Guidelines

Suggestion selling is a skill that requires certain guidelines to be effective.

- Suggestion selling can only be effective when the timing is appropriate.
- Satisfy the customer's initial need before suggesting additional items.

  NOTE: After making the initial selection/purchase the customer is usually in a buying mood and often is receptive to satisfying additional related needs.
- Demonstrate the suggested goods whenever possible.
- Avoid waiting until you are recording the transaction before suggesting other items.

Opportunities

Remain alert to the various suggestion selling opportunities that present themselves.

- Use suggestion selling to upgrade wants and needs.

  NOTE: It is often possible to trade up using the features and benefits of a more expensive model or type.

- Suggest related items

  NOTE: This is perhaps the most common form of suggestion selling.

  EXAMPLE: A customer purchasing an edger may be receptive to extra blades. Also, suggest related items from another area of the store.

- Suggesting a customer take advantage of the savings available through a co-op membership card.

- Suggest trend merchandise, fashion merchandise or promotional items.

  EXAMPLES: Silver halters and headsets; saddle blankets; "combo" clothing and caps; large and small tires.

OBJECTIVE 10

Match methods of closing to the appropriate explanation.

Every step in the sale process is a step toward a successful closing. Closing is defined as bringing the customer to a decision or action. It does *not* imply high pressure or manipulation.

Recognizing when a customer is ready to buy is an important aspect of effectively closing the sale. Most customers provide some buying signals. Some examples are:

Verbal

"This is just the right size."
"That would be perfect."
"How much is this?"

Non-verbal

"Customer reaches for purse, billfold, or check"
Customer handling merchandise
Nodding head
Looking at spouse/friend for approval

RETAIL SELLING CLOSES

Prior to using any of the following closing methods, it is recommended you summarize and reinforce the benefits of an item as they relate to the customer's needs.

- **Direct suggestion close**

  Direct suggestion closes require a "yes" or "no" decision from the customer. They ask for action.

  NOTE: They are most effectively used when noticing buying signals or after summarizing the item's benefits.

  EXAMPLE: "May I put this on your account?"

- **Alternative Choice Close**

  Alternative choice closes are closes which offer the customer two or more buying options.

  NOTE: Often, in situations where merchandise presents different models, etc., you can ask the customer to choose between the differences present. The choice made often represents the buying decision.

  EXAMPLE: "So you want the one with the bagger instead of the basic model."

- **Assumed consent close**

  Assumed consent closes demonstrate the salesperson assumes the customer will buy.

- Assumed consent closes should only be used when you are very confident the customer "wants" the item and only needs a little help to make the decision.

  EXAMPLES: "Would you like for us to wrap it for you?"
  "Would you prefer a Tuesday or Wednesday delivery?"

CONTACT SELLING CLOSES

In addition to the preceding closes, the contact salesperson may find the following closes helpful.

- **Unbiased opinion close**

  An unbiased opinion close is based on the opinion of a disinterested person who has nothing to gain from the sale.

  EXAMPLE: A customer's friend, spouse or someone with special knowledge or skills, i.e. a mechanic

- **Premium close**

  The premium close is one that offers something extra in addition to the product being purchased.

- **Price concession close**

  The price concession is a close in which a special price concession is granted to induce a customer to buy.

- **Impending close**

  In the impending close, the customer is reminded of the need for immediate action because of a coming event.

  EXAMPLES: Harvest time, planting seasons, livestock show dates, etc.

- **Standing Room Only (SRO) close**

  In the Standing Room Only SRO Close, the customer is reminded that everyone wants this merchandise and the supply is scarce.

OBJECTIVE 11 **Select from a list true statements about what to say during a sales presentation.**

- Sell the benefits of the product that meets the customer's needs rather than the product features alone.

  Use the six magic words: "What this means to you is ..."

  NOTE: The words "you" and "yours" used with benefit selling make it even more effective because it personalizes the feature for the customer.

- Create pictures in the customer's mind of using the product.

  EXAMPLES: "Mr Lane, you can really finish up your mowing quickly with this riding mower and be ready to head for the lake on weekends."

- Refer back to statements made by the customer.

  EXAMPLE: "As you said, Mr. Green, this size trimmer will be easier to handle."

- Use descriptive words and phrases.

- Avoid degrading, annoying, or trite words and phrases.

  EXAMPLES: "You understand?", "Get the idea?"

- Avoid using words too technical for the customer.

- Support statements with facts and figures whenever possible.

- Use charts, pamphlets, and posters when available to illustrate benefits.

- Talk as if you anticipate the customer will buy, not as if you have just a faint hope that he or she might buy.

  EXAMPLES: "When you have used this for a few days, you will not part with it for three times the cost" is more effective than, "If you purchase this, you'll wonder how you ever got along without it."

- Ask a series of short questions to which the customer can answer "yes."

  EXAMPLE:

  Salesperson: "You want a chainsaw that's lightweight and easy to start?"

  Customer: "That's right."

  Salesperson: "Pick this one up. Isn't it light? It only weighs three pounds."

  Customer: "Yes, it's lightweight."

  Salesperson: "Now let's start it. See how easy that was."

  Customer: "Uh huh."

- Nod your head, "yes" when asking a question for which you expect to receive a positive response.

- *Never argue* or *sound rude* to a customer.

- Do not judge a customer by the way he or she is dressed.

- Use the words "you" and "let's" more than "I" during the presentation.

  NOTE: "Let's" is a powerful word because it implies "you and me together," making the customer feel that he or she is not alone in the buying decision.

- Use references of people admired in some way by the customer such as friends, community leaders, or famous personalities.

OBJECTIVE 12

Select from a list true statements about demonstrating merchandise. (Activity Sheet 2)

Guidelines

- The purpose of a demonstration is to convince a buyer that he or she should try the product to test his or her reaction as to what it will do for him or her.

- Almost every product has at least one feature that lends itself to demonstration.

- A good demonstration dramatizes how a product or service will fill a customer's needs as well as his or her wants.

- Sometimes, it is best to demonstrate just one feature of a product, rather than the entire article.

- An effective demonstration occurs when a salesperson shows how a product:

  - may be used
  - rides or drives
  - cuts
  - looks when worn
  - sounds, smells, or tastes
  - appears in the home, store, office, etc.

Techniques

When showing merchandise, you should:

- Handle merchandise respectfully to show that it has value.
- Hold merchandise with as little of your hands showing as possible.

  NOTE: Observe how products are held on television commercials.
- Hold small items at eye level.
- Show merchandise against a complementary background.
- Show merchandise as it would be used.
- Keep your eyes on the customer's face, glancing at the feature you are pointing out and then back again to the customer.

  NOTE: Some salespeople use a pen or pencil as a "pointer."
- Get the product into the customer's hands as soon as possible.

  NOTE: This gives the customer a feeling of ownership.
- Involve as many of the five senses as possible. The five senses are:
  - Sight
  - Touch
  - Hearing
  - Taste
  - Smell
- Avoid excesses in all phases of a presentation.

  NOTE: Elaborate dress, too many gestures, or too many questions may ruin a sales presentation.

OBJECTIVE 13 **Select from a list true statements about how to talk about price.**

- Generally, let the customer mention price first.

  NOTE: An exception would be if economy is one of the customer's main buying motives.

- Always support price with a positive statement.

  EXAMPLE: "You get all these features for just $49.88."

- When a retail customer objects to price, it is generally because he or she does not see the hidden values in the product.

  NOTE: If this happens, then it may be necessary for you to highlight the important selling points again to prove the price is reasonable.

- When a customer objects to price, he or she is either trying to see if the goods are really worth the asking price or is trying to drive a hard bargain.

  NOTE: If your product has certain features that warrant the higher price, then review those features again with the customer. Also, you need to be aware of competing products and the prices your competition is charging so you can handle this type of objection when it occurs.

- Generally, show medium-priced merchandise first if the customer does not indicate a price range.

- Show higher-priced merchandise if only two price ranges exist.

- Show the larger quantities if no preference is stated.

OBJECTIVE 14 **Match terms associated with warranties to their correct definitions.** (Supplement 3)

In order to complete a sale and encourage additional sales, manufacturers/sellers will often make certain guarantees of their products. The seller's obligation that results from the guarantee is a warranty.

There are two types of warranties:

Expressed – usually written and identified as either a *full warranty* or a *limited warranty.*

Implied - Unstated but assumed.

Expressed warranty—a promise, representation or assurance of some fact made by sellers to encourage the purchase of their goods or services

Full warranty—no charge for repair or replacement; if there is a time limit, it must be stated

Limited warranty—does not meet the requirements of a full warranty and the exact nature of this warranty must be stated

Implied warranty—an unstated assurance that is regarded as a part of every contract to sell

OBJECTIVE 15

Match types of customers to the most effective ways of dealing with them. (Activity Sheet 3)

When the customer is . . .	**Then you should . . .**
1. Cautious, thinks things through	Explain details and go slowly.
2. Impulsive, changes mind quickly	Omit details and go faster.
3. Skeptical, wants "concrete" proof	Agree with customer on small details; don't get into conflict.
4. Tense	Use a quiet voice and have a relaxing attitude.
5. Complains	Listen to customer and ask questions relating to the sales topic.
6. Self-centered	Play along with customer; concentrate on sale.
7. Eager for conflict	Be straight forward and sincere.
8. Shy	Reassure the customer by being sincere; don't be pushy.
9. Friendly, talks a lot	Lead the conversation back to the sales topic.
10. Unfriendly	Be friendlier.
11. Slow to make a decision	Stress the importance of decision.

OBJECTIVE 16

Match methods of handling customer objections about merchandise to correct descriptive statements. (Supplement 4, Activity Sheet 4)

Use the following methods when handling objections about the merchandise.

NOTE: It is important to recognize the difference between an excuse and a sincere objection. An excuse, such as "I'm just shopping around today," may be hiding a real objection.

Methods	**Corresponding Action**
"Yes . . . but" or "Yes . . . and"	Agree with the customer's reasoning before answering the objection. EXAMPLE: "Yes, it is a light color, but it is treated to be stain resistent."
• **Superior point**	Agree the objection is true and then offer a selling point to offset the objection. EXAMPLE: Customer: "I didn't think it would cost that much." Salesperson: "It is not a low-priced blanket and here is the reason why (pointing to tag). This is a "Battle Blanket" and that means top quality. This tough nylon outer shell is long wearing, won't snag and easy to clean. These straps are triple stitched and reinforced at the stress points and that's why it's worth the price.
• **Boomerang**	Turn the objection into a selling point. EXAMPLE: Customer: "These shears are so light" Salesperson: "That's modern technology. They are not only lighter and quieter, but the charge lasts twice as long as the other brand. And that means convenience and less chance of "spooking" your horses.
• **Explanation**	Use this method when you feel the objection is based upon a mistaken belief. Ask the custome to explain the objection. **NOTE:** Do so politely and sincerely so as no to offend the customer. EXAMPLE: Customer: "I wouldn't have an inline trailer; too hard to maneuver and back." Salesperson: "I'd be interested in why you think that, Mr. Jones."

Methods	**Corresponding Action**
• **Direct denial**	When the objection is in the form of a question or concerns company policy. EXAMPLE: Customer: "I was told I only had to pay fifty dollars down." Salesperson: "I'm sorry, but our policy requires twenty-five percent deposit."
• **Demonstration**	Objection is handled through a demonstration and a brief comment. EXAMPLE: Customer: "I need sturdier feeders. You know how they get stepped on in stalls." Salesperson: "Watch this, Ms. Anderson (stands on feeder), not one crack."

OBJECTIVE 17

Match common objections relating to time of purchase and/or price to the appropriate method of handling the objection.

When the customer says . . .	**Then you should . . .**
"That's more than I want pay."	• Determine the price range desired and to justify the price in terms of value.. **NOTE:** Your price may actually be lower when quality and service are considered.
"I can buy the same thing somewhere else for less."	• Point out advantages of buying in your store. • Point out how products that look alike may not be of the same quality. **NOTE:** By doing comparison shopping on a regular basis you will be able to inform your customers as to whethe products are exactly the same or only similar.
"I'll wait until it's marked down."	• Point out that the merchandise may soon be gone.
"I want my husband (wife, friend, boss) to see it first."	• Explain the convenience of approval, layaway, or credit policy.

"I don't have enough money right now."	• Explain the convenience of approval, layaway, or credit or return policy.
"Will you cut the price?"	• Explain that you want to be fair to all customers and it would seem unfair to other customers to cut prices for a few favored individuals.
"I can't afford it."	• Explain how many products will save the customer money in the long run. • Point out how the customer can't afford to be without the product. • Payment terms and trade-ins should be considered.
"I have always bought brand "X."	• Agree that it is a good brand. • Point out the benefits of your brand.
"I want to look around first."	• Repeat and emphasize the important features and benefits to the customer.

OBJECTIVE 18

Discuss how to handle statements about competitors.

When a customer invites criticism of your competitors, do *not* be led astray. Instead of criticizing others, spend your time building up the value of your own products, services and company. The more you talk about the competitor's product, the more publicity you give it. In the end, all you may accomplish is to make the customer curious to see the competitor's product.

OBJECTIVE 19

List sources of prospect's names.

The professional salesperson must constantly search for people who want the product and are able to buy it.

The effective salesperson always has more prospects listed than can possibly be contacted. Such a list is built by *consistently* jotting down new names – and one name invariably leads to another.

Some of the more common sources of prospects are:

- **Family and friends**

  Make a list of all your family and friends, and then ask them to suggest others who might need your product.

- **Local groups and tradespeople**

  Trade associations, parents associations or Chambers of Commerce are good sources. Also Lions, Rotary, Kiawanis, alumni associations, men's clubs, women's clubs, and sport or hobby clubs. Sometimes, the membership lists are hard to obtain, but perhaps by performing a service for the organization you might receive a copy.

- **Present and past customers**

  A satisfied customer is often an excellent source of new prospects.

- **Directories and lists**

  There are a great many directories and lists that a salesperson can use as sources for prospects: telephone and city directories, trade and professional directories, commercial lists and miscellaneous lists.

  EXAMPLES: **Directories** – Thomas' Register of American Manufacturers, the American Medical Directory, Standard and Poor's Register of Directors and Executives, etc.

  NOTE: The library is a good source of these directories and others.

  EXAMPLES: R. L. Polk and Company, Reuben H. Donnelley Corporation, city, county and state government records, city tax lists, voters' registration lists, building permits, etc

The local newspaper can be a gold mine of leads for salespeople.

EXAMPLES: Stories about newcomers, new businesses, expansions of existing businesses, promotions, elections to office, birth announcements, actions taken by city government, permits issued, etc.

OBJECTIVE 20 **List ways to keep customers after the sale.**

Once a customer decides to buy, he or she is ultimately going to feel rewarded or regretful, and it is your job as a salesperson to help him or her feel rewarded. Anything that sells a customer on you will eventually sell more products and services and keep on selling them.

Here are some guidelines you can take that will put you ahead of the competition.

- Reinforce the buying decision immediately.

  NOTE: Compliment the customer's decision and say something like, "Great, I know you'll be glad you bought..." Later, write the customer a letter thanking him or her for the order.

- Follow up on the order to insure that the customer gets what you promised.

  NOTE: Staying on top of the details will help you spot and correct any problems before they occur.

- Make a non-selling follow-up call.

  NOTE: Call the customer and ask if everything is okay. Was it delivered on time? Is it working? Is he or she happy with the product?

- Keep good records and stay in touch.

  NOTE: Regularly touch base with your customers to test for future business. Keep a written record of what each customer buys and when he or she buys it. By keeping a record on each customer, you will be able to know when he or she is most in need of what you offer.

- Turn your customers into goodwill ambassadors.

  NOTE: Ask your customers for written testimonials and if you may use them as references. Also, ask them for referrals.

A CODE OF ETHICS

The foundation of business is confidence, which springs from integrity, fair dealing, efficient service, and mutual benefit.

Contracts and undertakings, written or oral are to be performed in letter and in spirit. Changed conditions do not justify their cancellation without mutual consent.

Unfair competition embracing all acts characterized by bad faith, deception, fraud, or oppression, including commercial bribery, is wasteful, despicable, and a public wrong. Business will rely, for its success, on the excellence of its own service.

Business should render restrictive legislation unnecessary by so conducting itself as to deserve and inspire public confidence.

From the Chamber of Commerce of the United States "Code of Business Ethics"

GUIDELINES FOR CONTACT SELLING

Here are some guidelines for opening remarks for a *contact* salesperson making a first visit to a prospect.

- Mention the customer's name in the salutation.

  NOTE: Sometimes a last minute observation made while entering the prospect's office will suggest a suitable greeting for you to use. A casual remark about the large number of people shopping in the store or some complimentary remark will be appreciated by the business person.

- Introduce yourself and mention your firm's name.
- Thank the customer for his or her time.
- State the immediate purpose of your visit to turn attention from yourself to the sale's message.
- Express interest in the customer's problem, mention a problem that exists in the business/industry (at large), or ask a pertinent question.
- Promise a benefit to the customer early in the opening remarks.

Some additional guidelines for the contact salesperson are:

- Maintain a good physical appearance.
- Be prompt in keeping appointments.
- Maintain confidence.
- During approach try to sense the customer's mood and whether he or she is receptive to your sales message.
- Have your selling points well-organized so you can lead with the strongest ones.
- Give a sample.
- Place a value on the customer's time as well as your own.

WARRANTY GUIDELINES

Use the following guidelines relating to warranties:

- Obtain copies of the warranties that apply to the products you sell.
- Review the warranties and become familiar with the basic conditions influencing the coverage given to the customer.
- When explaining the provisions of a warranty to a customer you should:
  - Obtain a copy of the warranty for the customer.
  - Explain all significant parts of the warranty to the customer.
  - Be prepared to answer questions concerning:

    -The product or parts covered.

    -How long repair or replacement will take.

    -The cost the customer must bear.

    -Remedies in case of a dispute.
- Never make any *false* or *misleading* statements that might change the warranty.

GUIDELINES FOR HANDLING OBJECTIONS

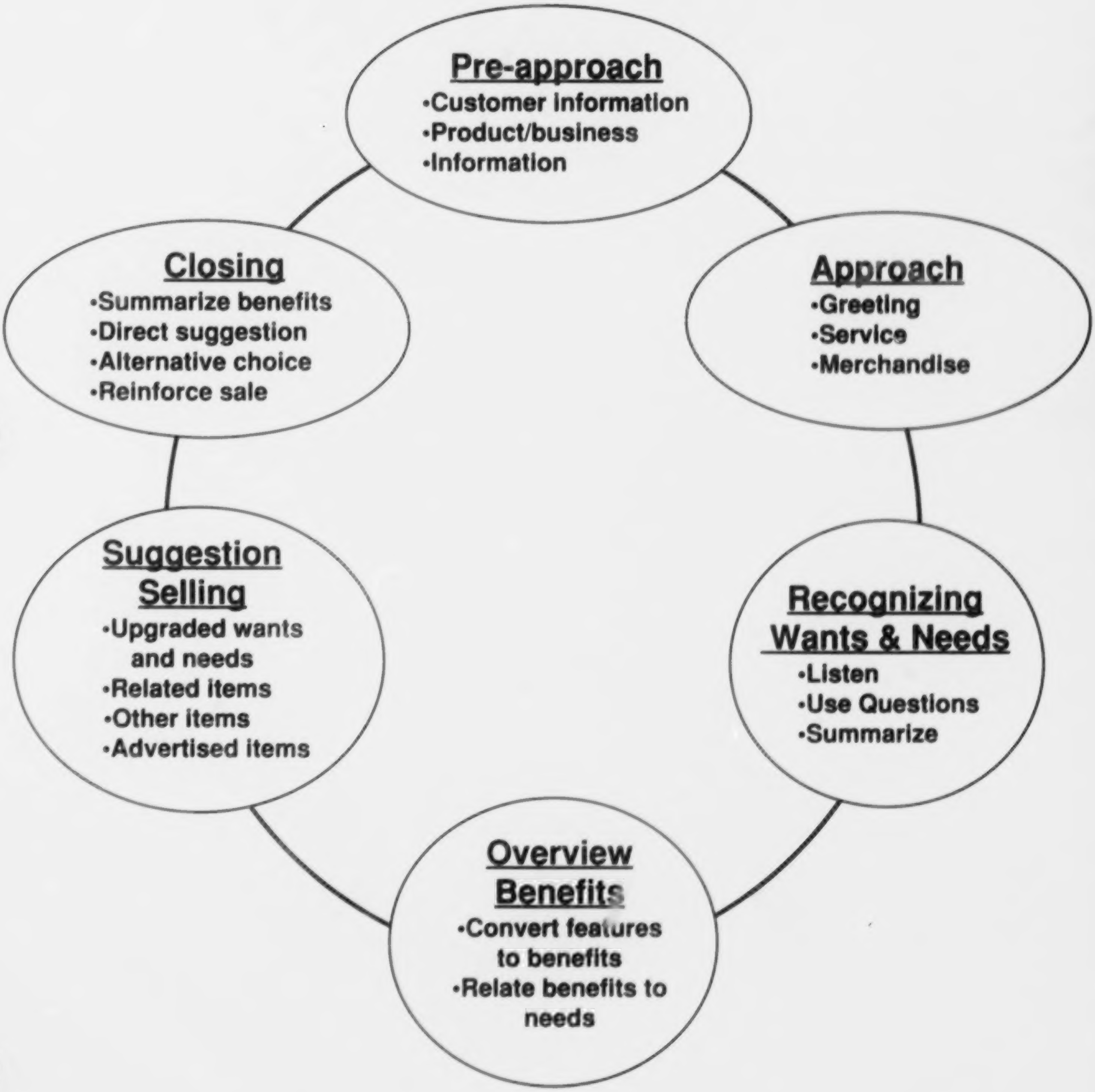
Use the following guidelines when handling customer objections.

- Anticipate objections and try to answer them with adequate product information beforehand.

  NOTE: This is especially important with new or controversial products.

- Welcome objections as a signal that the customer needs more information.
- Use objections as clues on how to improve service.
- Realize that objections are natural and often show that the customer is interested in buying.
- Realize that the customer may be convinced by needs assurance so that the purchase can be justified later at home, to friends or at work.
- Realize that objections can be used to improve future sales presentations.
- Avoid any delay in answering objections.

A Professional Sales Process



Pre-approach
- Customer information
- Product/business
- Information

Approach
- Greeting
- Service
- Merchandise

Recognizing Wants & Needs
- Listen
- Use Questions
- Summarize

Overview Benefits
- Convert features to benefits
- Relate benefits to needs

Suggestion Selling
- Upgraded wants and needs
- Related items
- Other items
- Advertised items

Closing
- Summarize benefits
- Direct suggestion
- Alternative choice
- Reinforce sale

NAME ______________________________

FEATURES AND BENEFITS

INSTRUCTIONS

You have been assigned or have brought with you a product from your store. Take a few minutes and review the item and its product information. Then draft a list of features, benefits, and needs the benefits will meet. Also list how the features might be demonstrated.

Be prepared to present these features and benefits to the group in a selling context.

Merchandise Item:

Feature	Benefits	Needs Benefit Will Meet	How to Demonstrate
This sheet is made with cotton and nylon.	Which means it will be cool and absorbent.	A nice thing to to have when cooling out your horse.	Feel how light-weight it is.

ACTIVITY SHEET 2

SELLING AND CUSTOMER SERVICE

VIII

NAME ______________________________

SHOWING AND TALKING ABOUT MERCHANDISE

INSTRUCTIONS

Complete these activities using the following products: a.) cut flower arrangement, b.) electric drill, c.) snow tires, d.) premium grade feed, e.) custom baling, f.) jeans, g.) cultivator, h.) "Big Dooley" pick-up.

1. Write selling sentences that would create pictures in the customer's mind of each of the products being used.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

f. ______________________________

g. ______________________________

h. ______________________________

2. Tell how you would involve as many of the senses as possible in selling each of these products.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

f. ______________________________

g. ______________________________

h. ______________________________

3. List three products you sell or would like to sell and answer the previous questions about those three products.

   a. Selling sentences

      1.____

      ____

      2.____

      ____

      3.____

      ____

   b. Involving the senses

      1.____

      ____

      2.____

      ____

      3.____

      ____

      ____

NAME ____

TELL HOW YOU WOULD HANDLE THE FOLLOWING CUSTOMERS

1. Impulsive Irma: "I want to buy a green saddle pad; no, I want a tan one. They look like the same quality; I think I'll take the green one."

   ____

   ____

   ____

2. Deliberate Debbie: "I want a pet for my elderly mother. What kinds of puppies do you have? Do you have pedigreed animals or any pets that can already perform tricks?"

   ____

   ____

   ____

3. Undecided Eugene: "I need some decorations for a 4-H banquet, but I don't know what kids like today. Do you think they would like these?"

   ____

   ____

   ____

4. Decided Delbert: "I want the riding mower with a 48 inch cut, headlights and an adjustable padded seat. That's what I want, but you don't have it."

   ____

   ____

   ____

5. Talkative Teri: "I need 500 pounds of crimped oats, 800 pounds of alfalfa pellets, and 500 pounds of Omalene. Hey, did you see all the nice trophy's they were giving last Saturday? I particularly liked the director chairs and the blankets were nice, too. Do you know what Ann won?"

____

____

____

6. Silent Sam: "I just don't know . . . "

____

____

____

7. Know-It-All Ned: "That's not a good quality leather. It is more important to have hard leather. I know because I've been buying leather goods in here since before you were born. I know what's good and what isn't."

____

____

____

NAME ____________________

OVERCOMING OBJECTIONS

Below is a list of objections. Tell how you would answer each one.

1. Your price is too high. ____________________
2. I must consult my husband first. ____________________
3. I'm in a hurry now, but I will be back later. ____________________
4. I think I can do better somewhere else. ____________________
5. I left my pocket book at home. ____________________
6. I'm too tired to know what I want. ____________________
7. Everyone in town will have one just like this. ____________________

8. I can buy it cheaper across the street. ____________________

____

____

9. Will you reduce the price? ____________________________

____

____

10. I won't have anything to do with your company; they gave me a bad deal last year. ________________________________

____

600

ACTIVITY SHEET 3

1.
   - Give quick service.
   - Give quick, to-the-point answers.
2.
   - Show merchandise with information and demonstration.
   - Show a variety of merchandise and guide the comparisons.
   - Don't rush decisions.
3.
   - Don't show too large an assortment.
   - Show, explain, and demonstrate.
   - Give honest compliments to build confidence.
   - Help without forcing a decision.
4.
   - Show the merchandise quickly.
   - Tell customer if the merchandise is not available and quickly point out the benefits of a suitable substitute.
5.
   - Respond in a friendly manner.
   - Try to keep the conversation on the subject.
6.
   - Try to draw the customer out by questioning.
   - Watch customer carefully for any signs of interest.
7.
   - Disarm customer by not offering the resistance he or she expects.
   - Agree with customer whenever possible.
   - Get in selling points by elaborating on those features considered important by the customer.
   - Appeal to his or her vanity by asking questions.
   - Let the customer do the talking.
   - Guard your remarks to keep from antagonizing the customer.
   - Let the customer make his or her decision without letting him or her think that your help is needed.

ASSIGNMENT SHEET 1 | **SELLING AND CUSTOMER SERVICE** | **VIII**

NAME ______________________________ SCORE ________

OBJECTIVE 21

Develop a merchandise, greeting and service approach for six products or services.

1. Write a merchandise, greeting and service approach for the products listed below:

Product: Electric "bug zapper"

a. Merchandise approach

____

____

b. Greeting approach

____

____

c. Service approach

____

____

Product: Roto-tiller

a. Merchandise approach

____

____

b. Greeting approach

____

____

c. Service approach

____

____

Product: Box blade

a. Merchandise approach

____

____

b. Greeting approach

____

____

c. Service approach

____

____

2. Select three products you sell or would like to sell and write a merchandise, greeting, and service approach for each one.

Product:

a. Merchandise approach

____

____

b. Greeting approach

____

____

c. Service approach

Product:

a. Merchandise approach

____

____

b. Greeting approach

____

____

603

c. Service approach

____

____

Product:

a. Merchandise approach

____

____

b. Greeting approach

____

____

c. Service approach

____

____

604

ASSIGNMENT SHEET 2

SELLING AND CUSTOMER SERVICE

VIII

NAME ______________________________ SCORE ________

OBJECTIVE 22

Develop leading questions to determine the customer's needs.

Below are some problems where you are to assume the saleperson's role and ask leading questions to find out what the customer needs.

1. Mr. Hill comes into your garden center and says, "I want to get a book on gardening."

2. A woman comes into your farm supply store and says, "I want to look at a heater."

3. A man enters your store and says, "Let me have some wormer."

4. An elderly housewife comes into your store and says, "I need some bird food."

5. A man and his son come into your store. The man greets you by saying, "My son wants to get a hat."

6. A man comes into your department and says, "I need some type of dog food."

7. A woman in your store says, "I want some spray to get rid of the bugs in my garden."

8. A hesitant young man in a tack shop says, "I would like to get a pair of English boots."

9. A student enters your store and says, "I need a present for my friend who likes horses."

10. A teenager in a tack shop says, "Let me see your clippers."

ASSIGNMENT SHEET 3

SELLING AND CUSTOMER SERVICE

VIII

NAME ______________________ SCORE ________

OBJECTIVE 23

Distinguish between feature and benefit statements. Write a "B" in front of the benefit statements and an "F" in front of the feature statements.

____ 1. These drill bits are high carbon steel.

____ 2. You can wear this outfit many ways.

____ 3. You will enjoy this economy cage because you will spend a lot less on maintenance.

____ 4. Because of the water treatment, this coat will keep you protected from the rain at all times.

____ 5. This is good hardwood paneling.

____ 6. You may get these jackets monogrammed with the person's initials for a lovely personalized gift.

____ 7. This halter is nylon.

____ 8. Your children will enjoy these videos while learning horsemanship.

____ 9. This coat will be a flexible addition to your wardrobe and will travel anywhere.

____ 10. This carpet of 100% polypropylene fiber will give you extra wear, and it is easy to clean.

____ 11. This mower is 48 inches wide.

____ 12. This feeder is made of stainless steel.

____ 13. This sewing machine makes professional buttonholes of any length without turning the fabric.

____ 14. This pool table has four leg levelers which assure you of good true table balance and a true roll.

____ 15. Your rear bagger can be lined with plastic trash bags for easier leaf and clipping disposal.

ASSIGNMENT SHEET 4

SELLING AND CUSTOMER SERVICE

VIII

NAME ______________________ SCORE ________

OBJECTIVE 24 **Write suggestion selling statements.**

Part I

List related items for each of the following products.

1. Chain saw

____

____

2. Garden see

____

____

3. Boots

____

____

4. Edger

____

____

5. Wild-bird seed

____

____

6. Chew-stop

____

____

7. Straw hat

____

____

8. Silver buckle

9. Halter

10. Horse and mule feed

Part II

Write suggestion selling statements for the following situations.

1. Animal shampoo that is less expensive in giant size

2. Fertilizer spreader advertised in the newspaper and displayed for the spring sale

3. Landscape timbers that are less expensive if bought by the bundle

4. Bedding plants that just arrived.

5. Portable storage buildings which are reduced 25%

609

6. Wicker baskets

____

____

7. Outdoor Christmas decorations

____

____

8. Foil wrapped plants for Easter and/or Mother's Day

____

____

9. Valentine's Day approaching

____

____

10. Milk on sale

____

____

ASSIGNMENT SHEET 5 — SELLING AND CUSTOMER SERVICE — VIII

NAME ______________________________ SCORE ________

OBJECTIVE 25 **Analyze a sales demonstration.**

Read the following sales demonstration and answer the questions after the dialogue.

A woman enters the boot department of a local western wear store and looks at a display of boots. The salesperson walks toward her.

Salesperson: May I help you?

Customer: Well, maybe. I'm looking for some ropers.

Salesperson: All the ropers are on that table (pointing to a table).

Customer: Are those all the colors you have?

Salesperson: Yes.

Customer: Oh, here are some in grey. Do you have these in my size?

Salesperson: What size do you wear?

Customer: I don't know. It's 6 1/2 B or 7B. I'm not sure.

Salesperson: Ok. Let's try a 6B. (The salesperson goes to the stockroom and comes back with a box and hands it to the customer.)

Salesperson: Why don't you try these on? I'll be right back.

Customer: Thank you. (After a while, the salesperson returns)

Salesperson: Are they all right?

Customer: I think so, but they feel a little bit tight.

Salesperson: I'll stretch them for you.

Customer: That might help.

Salesperson: Will that be cash or charge?

Customer: I'm still not sure. I do like these, but I think I'll look around.

Salesperson: Ok.

1. What particular things were wrong with this demonstration?

2. What could the salesperson have said and done to make his or her sales demonstration more effective?

3. Rewrite the presentation and dialogue as you would go through the sales process.

NAME ______________________________ SCORE ________

PUTTING IT ALL TOGETHER

OBJECTIVE 26 **Conduct a sales demonstration.**

During the previous sessions, you have learned many of the skills associated with the sales process. The purpose of this assignment sheet is to "put together" and practice the skills learned in this unit.

Select a product you can bring to class and prepare a five-minute sales presentation and demonstration for it. Try to choose a product that you are interested in.

Select two outstanding features that might interest the members of the class in buying the product. Arrange to have one or perhaps two demonstrations for each feature.

Begin your presentation by making an approach to the customer.

SALES DEMONSTRATION RATING SHEET

RATING SCALE
Superior 80-100
Excellent 60-79
Good 40-59

Student's Name ______________________________

Type of Merchandise Sold ______________________________

APPROACH: (Possible Points—10)	Poor 0-1-2	Fair 3-4-5	Good 6-7-8	Excellent 9-10	Judged Points
1. Alertness (2 pts.)					
2. Sincerity (2 pts.)					
3. Approached the customer correctly for the selling situation (2 pts.)					
4. Used an appropriate greeting (2 pts.)					
5. Appearance (2 pts.)					

613

PRESENTATION: **(Possible Points—25)**	0-7	8-14	15-22	23-25

1. Was presentation clear? (5 pts.)
2. Were benefits shown? (5 pts.)
3. Was customer given an opportunity to talk and ask questions? (5 pts.)
4. Was sufficient merchandise information given? (5 pts.)
5. Was presentation too rapid or too slow? (5 pts.)

HANDLING OBJECTIONS: (Possible Points—15)	2-3-4	6-7-8	10-11-12	13-14-15

1. Was each objection answered? (5 pts.)
2. Was tact used in handling objections? (5 pts.)
3. Was customer given an opportunity to voice objections? (5 pts.)

VOICE: (Possible Points—15)	2-3-4	6-7-8	10-11-12	13-14-15

1. Was volume too loud or too soft? (5 pts.)
2. Was voice clear? (5 pts.)
3. Was tone varied or monotonous? (5 pts.)

CLOSE:(Possible Points—20)

1. Was close smooth and natural? (10 pts.)
2. Did contestant take advantage of opportunities to close? (10 pts.)

SUGGESTION SELLING:
(Possible Points—15)

1. Was this a smooth and natural part of the sale? (5 pts.)
2. Did contestant select a properly related item to suggest? (5 pts.)
3. Was the timing proper for the suggestions of a related item? (5 pts.)

TOTAL POSSIBLE POINTS 100 **TOTAL JUDGED POINTS**

Judge's Name________________________ Instructor's Name__________________________

ASSIGNMENT SHEET 1

Check to see that student has completed has completed the exercise using the information learned in Objective 6.

ASSIGNMENT SHEET 2

Check to see that student has completed the exercise using information learned in Objective 7.

ASSIGNMENT SHEET 3

1. F
2. B
3. B
4. B
5. F
6. B
7. F
8. B
9. B
10. B
11. F
12. F
13. B
14. B
15. B

ASSIGNMENT SHEET 4

Check to see that student has completed the exercise using information learned in Objective 9

ASSIGNMENT SHEET 5

Check to see that student has completed the exercise using information learned in Objective 11

ASSIGNMENT SHEET 6

Check to see that student has completed the exercise using information learned in Objective 12.

OBJECTIVE 1

Match terms associated with sales and service to their correct definition. Write the correct letters in the blanks.

____ 1. The practice of giving false or misleading information about merchandise to make the merchandise more appealing and to lure customers into buying

____ 2. A Latin term which means, "Let the buyer beware," implying that the purchase is made at the buyer's own risk

____ 3. Preparations for selling

____ 4. The practice of advertising a product at a very low price and the making an effort to switch the customer who responds to more expensive merchandise

____ 5. Reasons people buy products or services

____ 6. A method of selling where the salesperson makes as many calls as possible without any preliminary investigation

____ 7. The practice of paying a salesperson a percentage of his or her sales

____ 8. People upon whom a salesperson can call with some form of introduction from a friend/acquaintance

____ 9. Goals or assignments either in dollars or units for a specific period of time

___ 10. Predetermined amount of pay

___ 11. A policy adopted by most retailers that ensures all customers that at any given time they will be charged the same price for the same merchandise and that the seller will not discriminate in favor of certain customers

a. Salary
b. Switching
c. Advertising
d. Sales quota
e. Caveat emptor
f. Misrepresentation
g. Cold canvassing
h. Competition
i. Pre-approach
j. Buying motives
k. Insurance policy
l. Referred leads
m. Fraud
n. Commission
o. Endless chain method
p. Marketplace
q. One price policy
r. Free enterprise
s. Fairness
t. Never-out-list

___12. A process of securing names of prospects from everyone the salesperson calls on

___13. A practice that ensures customers receive good merchandise value for their money, usually associated with a on price policy

___14. A stock-control system, (sometimes called a *checklist*) which identifies items that are to be "in-stock" at all times

OBJECTIVE 2

List common duties of a salesperson in addition to direct selling. Write five duties in the space provided.

____

____

____

____

____

____

OBJECTIVE 3

List the characteristics and qualities of a professional salesperson. Write two characteristics or qualities under each category.

Physical characteristics

____

____

____

____

Speaking characteristics

____

____

____

____

Moral qualities

Intellectual qualities

Social qualities

OBJECTIVE 4

Arrange in order the steps of a professional sales process. Write "1" in front of the first step, "2" in front of the second step, and so on.

___ Overview Benefits

___ Approach

___ Closing

___ Pre-approach

___ Suggestion Selling

___ Recognize Wants and Needs

OBJECTIVE 5

List the kinds of information a salesperson needs to gather during the pre-approach step. Write three kinds of information needed about customers and three kinds of information needed about products in the space below.

Information needed about a customer

Information needed about your product and business

OBJECTIVE 6

List the types of retail sales approaches.

OBJECTIVE 7

List the techniques to use to determine customer wants and needs.

OBJECTIVE 8

Match product features and benefits. Write the correct letters in the blanks.

FEATURES

Electric Drill

____ 1. Cordless/rechargeable

____ 2. Wall mount recharge

Riding Mower

____ 3. 17 inch turning radius

____ 4. Cast iron cylinder liner

Cage and Table Dryer

____ 5. Totally enclosed motor

____ 6. Variable temperature control

Hydraulic cattle chute

____ 7. Separate compact power source

____ 8. Controls mounted on frame

Horse farm management software

____ 9. Inventory lists horses by type, age, etc.

____ 10. Owner billing

BENEFITS

a. Won't clog with hair; quiet and powerful

b. Safer for man and animal

c. Adjusts to suit the task

d. Improves cash flow

e. Up-to-date information

f. Smooth, dependable stops

g. Saves time

h. Goes anywhere

i. Saves space

j. Convenience, easy to operate

k. Long life, rugged, dependability

l. Allows you to make sound management decisions

m. Weaves easily between trees, sandboxes, swing sets

n. Eliminates noise

OBJECTIVE 9

State guidelines and opportunities for suggestion selling.
Write two guidelines and two opportunities in the space provided

Guidelines ____

____

____

Opportunities ____

____

____

OBJECTIVE 10

Match methods of closing to the appropriate explanation.
Write the correct letters in the blanks.

____1. A close that is based on the opinion of a disinterested person who has nothing to do with the sale

____2. A close that requires a "yes" or "no" answer from the decision. They ask for action

____3. A close in which a special price concession is granted in order to induce a customer to buy

____4. The customer is reminded that everyone wants this merchandise and the supply is scarce

____5. A close that offers the customer two or more buying options

____6. A close in which the salesperson assumes the customer will buy

____7. A close that offers something extra in addition to the product being purchased

____8. The customer is reminded of the need for immediate action because of a coming event

a. Impending close

b. Varied choice close

c. Price concession close

d. Premium close

e. Unbiased opinion close

f. Guaranteed close

g. Assumed consent close

h. Alternative choice close

i. Absentee close

j. Direct suggestion close

l. Standing Room Only (SRO) close

m. Indirect suggestion close

OBJECTIVE 11

Select from a list true statements about what to say during a sales presentation. Write an "X" in the blank before each true statement.

____ 1. Sell features instead of benefits.

____ 2. Create pictures in the customer's mind of using the product.

____ 3. Do not refer back to statements made by the customer.

____ 4. Use descriptive words and phrases.

____ 5. Avoid degrading, annoying, or trite words and phrases.

____ 6. Use technical words to show the customer.

____ 7. Talk as if you hope that the customer might buy.

____ 8. Ask questions to which a customer can provide long drawn out answers.

____ 9. Never argue or sound rude with a customer.

____ 10. Do not judge a customer by the way he or she is dressed.

____ 11. Use references of people admired in some way by the customer such as friends, community leaders, or famous personalities.

OBJECTIVE 12

Select from a list statements about demonstrating merchandise. Write an "X" in the blank before each true statement.

____ 1. Handle merchandise respectfully to show that it has value.

____ 2. Do not use your hands during a presentation.

____ 3. Show merchandise as it would be used.

____ 4. Keep your eyes on the merchandise.

____ 5. Hold the product for the customer as long as possible.

____ 6. Involve as many of the five senses as possible.

____ 7. Avoid excesses in all phases of a presentation.

OBJECTIVE 13

Select from a list true statements about how to talk about price. Write an "X" in the blank before each true statement.

____ 1. Generally, let the customer mention price first.

____ 2. Always support price with a positive statement.

____ 3. Generally show the lowest priced merchandise first.

____ 4. Show small quantities if no preference is stated.

OBJECTIVE 14

Match the terms associated with warranties to their correct definitions. Write the correct letters in the blanks provided.

____1. An unstated assurance of every contract to sell that is regarded as a part

____2. A warranty under which there must be no charge for repair or replacement. If there is a time limit, it must be stated

____3. A promise, representation or assurance of some fact made by seller to encourage the purchase of their goods or services

____4. A warranty that does not meet the requirements of a full warranty and the exact nature of this warranty must be stated

a. Partial warranty

b. Unlimited warranty

c. Full warranty

d. Limited warranty

e. Expressed warranty

f. Implied warranty

OBJECTIVE 15

Match types of customers to the most effective ways of dealing with them. Write the correct letters in the blanks.

When the customer is . . .

____1. Impulsive, changes mind quickly

____2. Tense

____3. Self-centered

____4. Shy

____5. Unfriendly

____6. Cautious, thinks things through

____7. Skeptical, wants "concrete" proof

____8. Complains

Then you should . . .

a. Explain details and go slower

b. Stress the importance of decision

c. Omit details and go faster

d. Be friendlier than usual

e. Agree with customer on small details; don't get into a conflict

____ 9. Eager for conflict

___ 10. Friendly, talks a lot

___ 11. Slow to make a decision

f. Lead the conversation back to the sales topic

g. Use a quiet voice and have a relaxing attitude

h. Hurry the customer into making a decision

i. Point out that you know more about the product than the customer

j. Reassure the customer by being sincere; don't be pushy

k. Be straight forward and sincere

l. Ignore customer's remarks

m. Play along with customer; concentrate on sale

n. Listen to customer and ask questions relating to sales topic

o. Let the customer talk all they want to

OBJECTIVE 16

Match methods of handling customer objections about merchandise to correct descriptive statements. Write the correct letter in the blank spaces.

____1. Agree the objection is true and then offer a selling point to offset the objection

____2. Use this method when you feel the objection is based upon a mistaken belief

____3. Objection is handled through a demonstration and a brief comment

____4. Turn the objection into a selling point

____5. When the objection is in the form of a question or concerns company policy

____6. Agree with the customer's reasoning before answering the objection

a. Reasoning

b. "Yes . . . but" or "Yes . . . and"

c. Direct denial

d. Sincere objection

e. Explanation

f. Superior point

g. Demonstration

h. Brief comment

i. Boomerang

OBJECTIVE 17

Match common objections relating to time of purchase and/or price with the appropriate method of handling the objection. Write the correct letter in the blanks. There may be more than one answer to some questions.

____1. Point out that the merchandise may soon be gone.

____2. Determine the price range desired and justify the price in terms of value.

____3. Explain how many products will save the customer money in the long run; point out how customer can't afford to be without the product; payment terms and trade-ins should be considered.

____4. Explain the convenience of approval, layaway, or credit policy.

____5. Point out advantages of buying in your store; point out how products that look alike may not be of the same quality.

a. Will you hold it for me?

b. I have always bought brand "X."

c. I have forgotten my checkbook.

d. That's more than I want to pay.

e. I'll wait until it's marked down

f. I want my husband (wife, friend) to see it first

g. I can buy the same thing somewhere else for less

h. Will you cut the price?

625

____ 6. Explain that you want to be fair to all customers and it would seem unfair to other customers to cut prices for a few favored individuals.

____ 7. Agree that it is a good brand; point out similar features; point out the benefits of your brand.

____ 8. Repeat and emphasize the important features and benefits to the customer.

i. I can't afford it.

j. Thank you, I'm just looking.

k. I want to look around first.

l. I don't have enough money right now.

OBJECTIVE 18 Discuss how to handle statements about competitors.

OBJECTIVE 19 **List sources of prospect's names.** Write three sources in the space provided.

OBJECTIVE 20 **List ways to keep customers after the sale.** Write three ways in the space provided.

NOTICE The following assignment sheets are not a part of the written test. If these activities have not been completed, check with your instructor.

OBJECTIVE 21 **Develop a merchandise, greeting and service approach for six products or services.** SCORE ________

OBJECTIVE 22 **Develop leading questions to determine the customer's needs.** SCORE ________

OBJECTIVE 23 **Distinguish between feature and benefit statements.** SCORE ________

OBJECTIVE 24 **Write suggestion selling statements.** SCORE ________

OBJECTIVE 25 **Analyze a sales demonstration.** SCORE ________

OBJECTIVE 26 **Conduct a sales demonstration.** SCORE ________

OBJECTIVE 1

1. f
2. e
3. i
4. b
5. j
6. g
7. n
8. l
9. d
10. a
11. g
12. o
13. s
14. t

OBJECTIVE 2

Answer may include any five of the following:

- Arranging display fixtures
- Keeping stock ready to sell
- Maintaining stock records
- Learning about merchandise
- Checking competition
- Understanding stock room arrangements and operation
- Keeping selling area neat and clean
- Handling customer complaints
- Handling returns and refunds
- Controlling merchandise shortages
- Wrapping merchandise
- Taking inventory
- Attending store meetings

OBJECTIVE 3

Answer may include any two from each category

- Physical characteristics
  - Is healthy
  - Has good posture
  - Practice good grooming
  - Wears appropriate clothing
  - Has mannerisms which are appropriate
- Speaking characteristics
  - Uses appropriate vocabulary
  - Uses correct grammar
  - Displays good use of terms and expressions
  - Uses correct pronunciation and enunciation
- Moral qualities
  - Displays honesty
  - Is responsible
  - Is courageous
  - Is loyal
  - Is industrious
  - Is diligent
  - Is ethical
- Intellectual qualities
  - Is resourceful
  - Is imaginative
  - Is ambitious
  - Is adaptable
- Social qualities
  - Is observant
  - Is enthusiastic
  - Is confident
  - Is courteous and tactful
  - Is sympathetic and empathetic

OBJECTIVE 4

4, 2, 6, 1, 5, 3

OBJECTIVE 5

Answer may include any three in each of the two categories

- Information needed about a customer
  - Name, address, business
  - Prospect's buying policies
  - Prospect's buying problems
  - Buying hours or a time when customer is best able to work with a salesperson
  - Who makes the decision to purchase
  - Family
  - Likes, dislikes, things in common with salesperson
- Information needed about your product and business
  - Stock locations
  - Company policies
  - Knowledge of brands, colors, sizes
  - Other important product information
  - Delivery dates
  - Comparison with competitor's products
  - How to care for the products, special handling, special protection, etc.

OBJECTIVE 6

- Greeting approach
- Service approach
- Merchandise approach

OBJECTIVE 7

- Listen
- Use questioning skills
- Summarize your understanding of the customer's needs
- Generate alternatives

OBJECTIVE 8

1. h
2. i
3. m
4. k
5. a
6. c
7. n
8. j
9. e
10. d

OBJECTIVE 9

Answer may include any two from guidelines and opportunities.

Guidelines

- Suggestion selling can only be effective when the timing is appropriate.
- Satisfy the customer's initial need before suggesting additional items.
- Demonstrate suggested goods when possible.
- Avoid waiting until you are recording the transaction before suggesting other items.

Opportunities

- Use suggestion selling to up graded wants and needs.
- Suggest related items.
- Suggesting a customer take advantage of the savings on sale or promotional items through our co-op membership card.
- Suggest trend merchandise, fashion merchandise or promotional items.

OBJECTIVE 10

1. e
2. k
3. c
4. l
5. h
6. g
7. d
8. a

OBJECTIVE 11

2, 4, 5, 9, 10, 11

OBJECTIVE 12

1, 3, 6, 7

OBJECTIVE 13

1, 2

OBJECTIVE 14

1. f
2. c
3. e
4. d

OBJECTIVE 15

1. c
2. g
3. m
4. j
5. d
6. a
7. e
8. n
9. k
10. f
11. b

OBJECTIVE 16

1. f
2. e
3. g
4. d
5. c
6. b

OBJECTIVE 17

1. e
2. d
3. i
4. l, f
5. g
6. h
7. b
8. k

OBJECTIVE 18

Explanation should include these key points:

- Do not be led astray
- Do not criticize a competitor
- Spend your time building up the value of your own products, services and company

OBJECTIVE 19

Answer may include any three of the following:

- Family and friends
- Local groups and tradespeople
- Present and past customers
- Directories and lists
- News stories

OBJECTIVE 20

Answer may include any three of the following:

- Reinforce the buying decision immediately.
- Follow up on the order to insure that the customer gets what you promised.
- Make a non-selling follow-up call.
- Keep good records and stay in touch.
- Turn your customers into goodwill ambassadors.

OBJECTIVE 21 Refer to answers to Assignment Sheet 1.

OBJECTIVE 22 Refer to answers to Assignment Sheet 2.

OBJECTIVE 23 Refer to answers to Assignment Sheet 3.

OBJECTIVE 24 Refer to answers to Assignment Sheet 4.

OBJECTIVE 25 Refer to answers to Assignment Sheet 5.

OBJECTIVE 26 Refer to answers to Assignment Sheet 6.

OBJECTIVE SHEET

MERCHANDISING

IX

INTRODUCTION

Ask anyone who is successful in retailing what the key to their success is and chances are they will tell you it is having what the customers want, at the time they want it, and at the price they want to pay.

There is no big secret to it. It is really that simple—or is it?

It is a matter of application and that is what this unit is all about... studying your role and the various systems and controls that have been developed to assist in "getting the right merchandise into your store, at the right time and at the right price."

UNIT OBJECTIVE

After completing this unit, the student should know how to receive merchandise, calculate prices, process claims, and make calculations and entries for inventory records. The student should also be able to calculate order quantities, complete a purchase order and apply formulas used in pricing merchandise. The student will demonstrate these competencies by completing the assignment sheets and written test with a minimum of 85 percent accuracy.

SPECIFIC OBJECTIVES

After completing this unit the student should be able to

1. Match terms associated with merchandise systems and controls to their correct definitions.
2. Match the sources of merchandise to their correct definitions.
3. Select from a list ways to identify suppliers.
4. Arrange in order the steps to take when receiving merchandise.
5. State guidelines for completing receiving records.
6. State the reasons for filing claims.
7. Arrange in order the steps to take when checking in merchandise.
8. Select from a list guidelines used when pricing merchandise.
9. Match markup theories to the correct explanation.
10. Arrange in order the steps to determine the retail price.

11. Distinguish between characteristics of the types of inventory systems.

12. Read cost codes.

13. Select from a list guidelines for taking a physical inventory.

14. Select from a list statements about inventory control guidelines.

15. Match terms associated with discounts and payments due to the correct definitions.

16. Apply formulas used in pricing merchandise. (Assignment Sheet 1)

17. Calculate inventory extensions. (Assignment Sheet 2)

18. Compute open-to-buy. (Assignment Sheet 3)

19. Calculate discounts and payments due. (Assignment Sheet 4)

20. Complete a purchase order. (Assignment Sheet 5)

PREPARATION

- Obtain materials to supplement unit.

  NOTE: See Suggested Resources.

- Review instructional outline for this unit. Modify time frames to suit class needs and plan activities for each class period.

- Study the specific objectives to determine those you will cover in your presentation. Decide also which objectives should be taught to which students.

- Determine scope and sequence of objectives that you add. Design and develop support materials, including evaluation techniques, for additional objectives.

- Determine how you will schedule time for students to demonstrate competence in the required procedures.

- Make arrangements for guest speakers. Supply speakers with specific objectives and other appropriate sections of the unit.

- Arrange with a local store to allow students to observe and/or assist in taking a physical inventory.

- Arrange with a local store to allow students to observe their receiving operation.

DELIVERY

Objective 1

- Discuss unit and specific objectives.

- Review terms and definitions with students.

Objectives 2 and 3

- Discuss Thomas' *Register of American Manufacturers* as a reference for identifying suppliers.

- Have a local merchant discuss sources of merchandise.

- Discuss the advantages and disadvantages of each type of supplier/source.

- Discuss developing a Resource File.

Objectives 4 through 7

- Review information sheets.
- Discuss Supplement 1 - Procedures for filing claims.
- Visit several local stores to observe their receiving and marking room(s) operations. Ask the supervisor to discuss receiving records and filing claims.

Objectives 8 and 9

- Discuss guidelines used when pricing merchandise and markup theories.
- Have students develop examples of local businesses that may use each of the markup theories.
- Have a local retailer discuss pricing and markup theories and their importance and relationship to a store's image.

Objective 10

- Discuss the steps to use to determine retail prices.
- Review Supplement 2.
- Use Transparency Master 1.
- Have students complete Assignment Sheet 1.

Objectives 11 through 13

- Discuss information sheets. Use Transparency Masters 2 and 3.
- Have a local merchant(s) discuss the retail and cost methods of inventory. Use Teacher Supplement 1, Computing inventory using retail prices and cost.
- Have students observe and/or assist with taking physical inventory. Use Teacher Supplement 1, Organizing and taking a physical inventory.
- Have students complete Assignment Sheet 2.

Objective 14

- Discuss inventory control guidelines.

- **Have a buyer or department manager discuss average inventory, stock turnover, stock-sales ratios, and markup/markon.**
- **Have a local merchant discuss the importance of developing a merchandise plan and tracking open-to-buy.**
- Use Teacher Supplements 3 through 5.
- Have students complete Assignment Sheet 3.

Objective 15

- Discuss terms associated with discounts and payments due.
- Have students complete Assignment Sheet 4.

APPLICATION

Objective 16

- Use Assignment Sheet 1 to give students practice in applying formulas used in pricing merchandise.

Objective 17

- Use Assignment Sheet 2 to give students practice in calculating inventory extensions.

Objective 18

- Use Assignment Sheet 3 to give students practice in computing open-to-buy.

Objective 19

- Use Assignment Sheet 4 to give students practice in calculating discounts and payments due.

Objective 20

- Use Assignment Sheet 5 to give students practice in completing a purchase order.
- Use Teacher Supplement 5 and Transparency Masters 4 and 5.
- Have a local retailer discuss how to determine order quantities and ordering procedures.

EVALUATION

Written test

- Explain to students that they will be asked to demonstrate on the written test actions listed in the specific objectives.
- Give written test.

  NOTE: The written test may be given in sections if desired.
- Evaluate students on assignment sheet activities if not previously done.
- Reteach and retest if necessary.
- Complete appropriate section of competency profiles.
- Review individual and group performance in order to evaluate teaching methods. Adjust scope, sequence, or instructional approaches for additional lessons as required.

SUGGESTED RESOURCES

Publications

- *The Buyer's Manual* National Retail Merchants Association, New York, 1979. Available from the National Retail Merchants Association, 100 West 31st Street, New York, New York 10001. This text offers a complete guide to buying and merchandising for retail stores. It includes numerous merchandising forms and detailed explanation of mathematics used in retailing.
- Chapman, Elwood N., *Dynamic Retailing,* Chicago, Illinois Science Research Associates, Inc., 1981. The contents of text reflects the dynamic and personal nature of retailing. Also contains case studies, discussion questions and short quizzes. Designed for a wide variety of students of retailing.
- *Register of American Manufacturers*

UNIT REFERENCES

- *The Buyer's Manual*, National Retail Merchants Association, New York, 1979.
- Chapman, Elwood N., *Dynamic Retailing*, , Science Research Associates, Inc., 1981. Chicago, Illinois.
- Lyon, Barbara Jean, *Business Management and Ownership Course of Study*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, 1982.

- Nelson, Frank, *DE II Course of Study*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1976.

ORGANIZING AND TAKING A PHYSICAL INVENTORY

As previously mentioned, it is very important that the inventory count be as accurate as possible. In order to accomplish this, a good deal of preparation is necessary before you start the count.

PREPARATION

Use the following steps to ensure your store is ready to take an inventory.

Office

- Obtain the appropriate inventory supplies.
- Check files for invoices, credit memos, etc. that may have been overlooked.
- Insure all records are current.
- Verify all price changes.
- Review Receiving Book for open entries.
- Clear up all charge-backs and claims.
- Conduct an employee meeting to:
  a. Inform them about the inventory
  b. Make work assignments

Stockroom

- Straighten and clear stockroom.
- Move as much saleable merchandise as possible to the salesfloor.
- Verify counts and prices on "carryover" items.
- Clean up all return/defective goods.
- Insure vendors pick up and issue credit memos for all damaged goods.

Salesfloor

- Fill and straighten every counter and rack.
- Insure every item is marked with the correct price.
- Number the wall sections on your store's floor plan.
- Number each counter, feature table, display and showcase on the floor plan.
- Tape a number to each fixture in a prominent spot according to the floor plan. Designate the sides as A, B, C, and D.

INVENTORY PROCEDURE

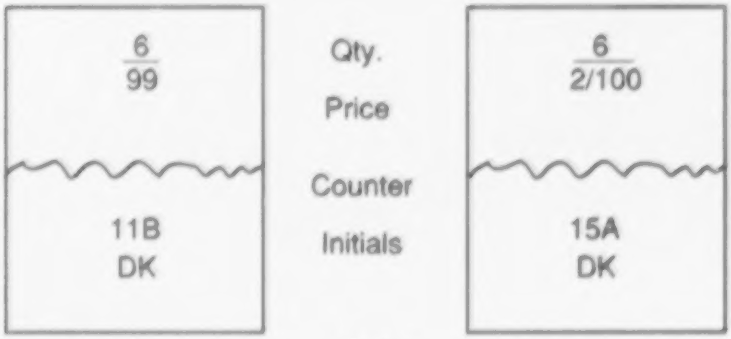
Use the following steps when counting.

- Start with the top shelf—the left hand corner and move left to right for the full length of the shelf.
- Drop down and count the next shelf left to right.
- Write the quantity and price on the inventory slips.

  EXAMPLE: 6 at $0.99 would be written as $\frac{6}{99}$

  RULE: Do *not* use dollar signs, decimal points or cent signs. Do include all zeros.
- Write multiple price items, like 2/100, 3/99, etc. on the inventory slip as shown.

  EXAMPLE: 6 at 2 for $1.00 would be $\frac{6}{2/100}$
- Write the counter number on every inventory ticket. Also put counter side designation A, B, C, or D on each ticket.
- Write the employee's initials at the bottom of each ticket.



CALCULATING PROCEDURE

- Pull the inventory slips in the same sequence as the count was made.
- Enter the count information on the inventory sheets.
- Enter the information on an adding machine.

COMPUTING AVERAGE INVENTORY

Average inventory is used to help establish merchandise plans and to figure turnover rates. The wise manager will use these calculations in planning increases and decreases in inventory.

PROCEDURE

Use these steps in calculating average inventory.

1. Add the opening inventories for each month of the period to the closing inventory for the period.

   NOTE: This may be done by using either the retail value or the number of units.

   EXAMPLE:

Jan 1	$2,198
Feb 1	2,300
Mar 1	2,497
Apr 1	2,500
May 1	2,379
June 1	2,312
July 1	2,598
Aug 1	2,491
Sept 1	2,333
Oct 1	2,312
Nov 1	2,564
Dec 1	3,241
Dec 31	1,986
	$31,711

2. Divide the total inventory for the period by the number of inventories counted.

   EXAMPLE: $\frac{\$31,711}{13}$=$2,439.31 average inventory for period

COMPUTING STOCK TURNOVER IN TERMS OF PHYSICAL UNITS AND ON A DOLLAR BASIS

Stock turnover is defined as the number of times a retailer sells or "turns" the retail dollar value of his or her inventory in a given period of time. It is in effect, a speedometer of which merchandise in various classifications is moving through the store.

The higher the turnover, the healthier the operation is as long as an understock condition does not develop. It is just as important that the store does not get in an overstocked condition. Overstocks create markdowns and tie up money that could otherwise be used to purchase new merchandise.

Stock turnover is based on average inventory for the period. If, for example, the average inventory of an item on hand for the year was $15,000 and sales for the year were $22,500, the turnover rate is 1.5. This tells the manager that one and one-half times the average inventory was needed to meet sales demand for that item during the year.

FORMULAS

Use the following formula to determine stock turnover.

- In terms of physical units

$$\frac{\text{Number of units sold}}{\text{Average inventory in units}} = \text{Stock turnover rate}$$

EXAMPLE: If 2,000 books were sold during the year and the average number of books in stock during the year was 1,000, the rate of turnover is 2.

$$\frac{2000}{1000} = 2 \text{ Turns}$$

644

- On a dollar basis

$$\frac{\text{Net sales in dollars}}{\text{Average dollar value of stock}} = \text{Stock turnover rate}$$

EXAMPLE: If $10,000 worth of books were sold during the year and an average of $5,000 worth of books was kept in inventory, the store has an average stock turnover of 2.

$$\frac{\$10{,}000}{\$\ 5{,}000} = 2 \text{ Turns}$$

COMPUTING STOCK-SALES RATIO

A definite ratio exists between stock on hand and the amount of sales that can be generated from it. Without the right amount of stock, projected sales figures cannot be reached. Stock turnover rate gives the retailer a yardstick to measure how fast stock is selling; it does not, however, say how much stock should be on hand in advance. A retailer must anticipate how much stock is needed before entering the spring planting season or the Christmas season. A stock-sales ratio by merchandise classification is a vital tool.

A common ratio during normal demand periods is 3 to 1. That is, to reach a certain sales figure, a retailer must have three times that amount in inventory. For example, it might take $30,000 in inventory (retail) to generate $10,000 in sales during a given month.

A major retailing goal is to develop as much as possible in sales from the smallest possible inventory, but it is dangerous to run out of merchandise that customers want. So, keeping tabs on sales-stock ratios helps the retailer know how much merchandise should be on hand at a certain time. Advanced buying can then be done accordingly.

A stock-sales ratio is significant because sales figures are always a direct result of inventory planning. Inventory and sales go hand in hand. That is why retailers must look ahead and base their inventories upon previously computed stock-sales ratio.

Formulas

Use the following formulas to figure stock-sales ratios.

NOTE: The amount of stock may be found in inventory records. The sales figures may be found in the store's sales records. In the following formulas:

B.O.M. means beginning of the month

E.O.M. means end of the month

$$\text{B.O.M. stock-sales ratio} = \frac{\text{B.O.M. stock at retail}}{\text{Sales for the month}}$$

EXAMPLE: If the amount of stock at the beginning of the month is $20,000 and sales for the month are $5,000, the stock-sales ratio would be 4:1 (four to one). $\frac{\$20,000}{\$5,000} = \frac{4}{1} = 4:1$

E.O.M. stock-sales ratio = $\frac{\text{E.O.M. stock at retail}}{\text{Sales for the month}}$

EXAMPLE: If the stock at the end of the month equals $10,000 and the sales for the month are $5,000, the stock-sales ratio is 2:1 (two to one).

$$\frac{\$10,000}{\$5,000} = \frac{2}{1} = 2:1$$

647

CALCULATING ORDER QUANTITIES

For some managers, it is difficult to determine the supply to maintain in stock. Some departments need a three-month supply; others a six-month supply; and still others maintain a two-week supply of merchandise on hand. How are these figures derived? In some cases product shelf life may be the determining factor...as is the case for many food items. Other factors to consider include lead time, discounts available, size of the merchandise, and special promotion events scheduled to take place. Generally, ordering guidelines are determined by a study of past records and industry data.

PROCEDURE

Use the following formulas for establishing order quantities.

1. Determine order point by:

Lead time + basic stock + safety stock = order point

EXAMPLE: Assume the store desires to maintain a basic stock of "widgets" equal to two weeks' sales and a safety stock of four weeks' sales. Lead time for order placement and delivery is three weeks. Average weekly sales are four widgets.+Lead time 3 weeks

+ Safety stock + 4 weeks
+ Basic stock + 2 weeks
9 weeks (order point, time)
Average weekly sales x 4 units
36 widgets (order point, units)

2. Determine order ceiling by:

Order point + expected sales during order interval = order ceiling

EXAMPLE: Assume orders are placed every five weeks.

9 weeks (order point, time)
+ 5 weeks (order interval)
14 weeks (order ceiling, time)
x 4 units (average weekly sales)
56 units (order ceiling, units)

3. Determine order quantity by:

Order ceiling - stock on hand = order quantity

EXAMPLE: Assume there are 32 widgets in stock on hand and that 15 widgets are on order. Order ceiling, units 56

-Stock on hand -32
-Stock on order -15
9 (order quantity)

BASIC ACADEMIC SKILLS

The following table identifies the basic academic skills that are reinforced in this unit of instruction. These basic academic skills were identified using *The Basic/Essential Skills Taxonomy*, second edition and verified during the validation process.

	SKILL AREA/ CODE	**VERB**	**LINK A**	**LINK B**
OBJECTIVE 1	Free Enterprise 003	Defines	Economic terms	
OBJECTIVE 2	Free Enterprise 003	Defines	Economic terms	
OBJECTIVE 3	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 4	Language Arts 146	Comprehends	Information-written	Sequence
OBJECTIVE 5	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 6	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 7	Language Arts 146	Comprehends	Information-written	Sequence
OBJECTIVE 8	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 9	Free Enterprise 003	Defines	Economic terms	
OBJECTIVE 10	Language Arts 146	Comprehends	Information-written	Sequence
OBJECTIVE 11	Language Arts 013	Applies/Uses	Definitions	
	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 12	Language Arts 013	Applies/Uses	Definitions	
	Mathematics 254	Understands	Order of operations	Rules
	Mathematics 177	Interprets	System of numbers	Place value
OBJECTIVE 13	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 14	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 15	Free Enterprise 003	Defines	Economic terms	
OBJECTIVE 16	Language Arts 035	Attends	Directions/ task	
	Mathematics 117	Converts	Formula	Equivalent form
	Mathematics 264	Uses Calculator	Formulas	
OBJECTIVE 17	Mathematics 097	Constructs	Charts/tables/ graphs	
	Mathematics 261	Uses calculator	Addition	
	Mathematics 266	Uses calculator	Multiplication	
OBJECTIVE 18	Language Arts 035	Attends	Directions/ task	
	Language Arts 013	Applies/Uses	Definitions	
	Language Arts 146	Comprehends	Information-written	Sequence
	Mathematics 034	Computes	Addition numbers	Whole
	Mathematics 092	Computes	Subtraction numbers	Whole

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 19	Language Arts 035	Attends	Directions/ task	
	Mathematics 117	Converts	Formula	Equivalent form
	Mathematics 264	Uses Calculator	Formulas	
	Mathematics 015	Calculates	Percent markup/discount	In/decrease,
OBJECTIVE 20	Language Arts 035	Attends	Directions/ task	
	Language Arts 058	Composes/ Edits	Forms/ documents	
	Language Arts 146	Comprehends	Information-written	Sequence
	Mathematics 015	Calculates	Percent markup/discount	In/decrease,
	Mathematics 266	Uses calculator	Multiplication	
	Mathematics 064	Computes	Multiplication	Decimals

OBJECTIVE 1

Match terms associated with merchandise systems and controls to their correct definitions.

- **Back order**—A part of an order that the vendor has not filled on time and that the vendor intends to ship as soon as the goods in question are available

- **Book inventory**—The amount of retail stock that is shown to be on hand in a perpetual inventory system

- **Breakeven point**—The sales volume point at which revenues and costs are equal; a combination of sales and costs which yields a no-profit, no-loss operation

- **C.O.D.**—Collect on delivery; the buyer must make payment for purchase at time of delivery of goods

- **Cost inventory**—The actual cost or market value, whichever is lower, of the inventory on hand at any time

  NOTE: The term seldom refers to the original price paid for the merchandise, but rather the present depreciated worth.

- **Cost method of inventory**—The determination of the cost of inventory on hand by marking the actual cost on each price ticket in code and computing inventory in the accounting period

- **Cost of goods purchased**—The purchase price of products bought plus the cost of transportation or delivery to the point where they will be used; does not typically include cash discounts

- **Cost of goods sold**—Cost of merchandise less discounts, but including transportation

- **Distributor**—Wholesale middleman, especially in lines where selection or exclusive agency distribution is common at the wholesale level and the manufacturer expects strong promotional support

- **End of month dating (EOM)**—Discount counted from the end of the month rather than the date of invoice

- **FOB (Free On Board)**—Any agreed-upon destination to which transportation charges are paid by the vendor while title passes to the purchaser

  EXAMPLE: FOB Manufacturer means purchaser arranges and pays for all shipping charges; FOB Store means vendor pays all shipping expenses to the store. FOB Destination: free on board at destination. The seller has agreed to be ultimately responsible for the freight charges. FOB Shipping Point: free on board at shipping point. The buyer has agreed to be ultimately responsible for the freight charges.

- **Gross sales**—Total sales before deducting returns and allowances, but after subtracting corrections and trade discounts, sales taxes and excise taxes based on sales; and, sometimes, cash discounts on sales

- **Inventory**—Value of merchandise on hand at cost or retail; "perpetual inventory" makes day-to-day changes in inventory

- **Invoice-An itemized statement from the vendor showing charges for merchandise; it should agree with your purchase order**

- **Keystone markup**—A markup on merchandise of 100 percent of cost or 50 percent of the retail or selling price

  EXAMPLE: An item costs $0.50, retails at $1.00.

- **Lead Time**—The length of time that elapses from the cut-off at a review point (count day or last day of sales) until ordered merchandise is available for selling at the location for which it has been ordered

- **List Price**—A printed price, as in a catalog, subject to trade and cash discounts

- **Markdown**—A reduction in the retail price of merchandise primarily taken for clearance of broken assortments and sizes, prior stock, for special sales events, and to meet competition

- **Markon**—The difference between the cost price as billed (before deductions for cash discounts) and the retail price at which merchandise is sold

- **Markup**—Upward revision of initial markon, resulting in a higher than original retail selling price

- **Markup percentage**—The difference between cost and retail, expressed either as a percentage of cost or, commonly, as a percentage of retail

- **Net Terms**—Those calling for the billed amount of the invoice, with no cash discount allowed

- **Perpetual inventory**—A bookkeeping systems, often computerized, that provides a retailer with immediate inventory information by classification of all merchandise in the store

- **Physical inventory**—An inventory determined by actual count, usually compiled in dollars as well as units

- **Retail method of accounting**—A method of accounting in which all percentages are relative to the retail price instead of the cost price

  NOTE: In the Cost Method of Accounting, all percentages are relative to the cost.

  EXAMPLES: **Retail Method**—An article is purchased for $1.00 to sell for $2.00. The margin is $1.00, but only 50% of the retail price.

  Cost Method—The article is purchased for $1.00 to sell for $2.00. The margin is $1.00, but is 100% of the cost.

- **Staple merchandise**—Merchandise that the customer expects to be in stock at all times and that is generally reorderable over a relatively extended period of time

- **Stock turnover**—An index of the velocity with which merchandise moves into and out of a store or department; formally defined, the "rate of stock turnover" is the number of times during a given period that the average inventory on hand has been sold and replaced

  NOTE: Turnover is computed by dividing sales by average inventory, with both stated in comparable valuations, either cost or selling price.

OBJECTIVE 2

Match the sources of merchandise to their correct definitions.

A retail store is only as good as the merchandise it sells. Expensive services and buildings cannot make up for merchandise.

Retailers are heavily dependent upon their resources. If a resource provides the right merchandise and ships it to the store on time, sends what was ordered and lives up to the purchase agreement, then the job of selling the merchandise is half done. However, if a resource is undependable and does not maintain high standards, the retailer will soon be at a competitive disadvantage. Therefore, the selection of vendors is critical to the retailer's success.

KINDS OF RESOURCES

- **Manufacturers**—Many manufacturers sell their products directly to the retailer; There is no middleman involved

  NOTE: The retailer has direct communication with those who produce the goods. The buyer can introduce ideas and negotiate for terms more easily. Manufacturers are frequently more responsive to retailers. Because of price and other considerations, the retailer should deal directly with manufacturers where possible.

- **Wholesalers**—wholesalers buy goods in large quantities and redistributes them in small quantities

  NOTE: The wholesaler usually has a wide assortment of merchandise for the retailer to select from. The retailer can buy in small quantities and more frequently. The retailer can purchase many products from the same salesperson and avoid dealing with an unmanageable number of vendors.

- **Distributor**—A wholesale middleman, especially in lines where selection or exclusive agency distribution is common at the wholesale level and the manufacturer expects strong promotional support; Often used as a synonym for wholesaler

- **Rack Jobber**—A type of wholesaler who sets up and services a department in a retail store on a contract basis.

  NOTE: A rack jobber bills the retailer at retail, less a percentage of gross profit.

- **Importers**—A type of wholesaler who is in the business of importing merchandise from foreign countries

  NOTE: If a store is one of a multi-store chain or is affiliated with a buying group, then chances are good the organization has resident buyers in foreign countries. If so, their buyers can deal with foreign manufacturers directly. For those who do not have these connections, dealing with importers is necessary if foreign goods are needed.

- **Jobbers, Agents, and Brokers**—These resources are primarily middlemen, who seldom warehouse or hold title to merchandise, but simply see that merchandise is moved through trade channels

  NOTE: Retailers need to stay in contact with jobbers and brokers in case their other resources cannot provide what they need to meet customer demands.

  NOTE: A vendor's suitability should be judged in the following key areas:

  - Merchandise desirability
  - Bargaining position on prices and terms
  - Deliveries
  - Vendor distribution practices
  - Promotional aids
  - Vendor's reputation for reliability

OBJECTIVE 3 **Select from a list ways to identify suppliers.**

- Ask manufacturer's representatives to suggest alternate sources of merchandise, i.e. noncompeting lines, new products or services.
- Read trade journals.
- Ask business associates for suggestions.
- Visit trade exhibits and conferences.
- Read yellow pages and other business directories.
- Attend major merchandise shows and markets, i.e. Dallas, Atlanta, Chicago, New York, San Francisco.

- Work with rack jobbers.

OBJECTIVE 4

Arrange in order the steps to take when receiving merchandise.

The receiving/marking area of a retail store has a lot to do with how effective the store is in meeting the needs of its customers.

An efficiently run receiving/marking area assures customers that merchandise will be received and marked in a manner that will speed wanted items to the sales floor in good condition and priced accurately.

RECEIVING MERCHANDISE

Use the following steps when receiving a shipment from a common carrier.

1. Verify with the freight bill that the shipment is addressed to your store. Do not accept merchandise addressed to another store.

   NOTE: A freight bill is provided by the carrier and used as a proof of delivery.

2. Help the delivery person unload and stack all boxes in receiving area. Insure each box is:

   — addressed to your store
   — free from damage

   NOTE: If a box is dented, open, wet, etc., inspect the contents for damage or shortage.

3. After unloading, count boxes and compare with freight bill for indicated quantities received.

4. Inspect freight bill to ensure all information is correct:

   — shipper
   — quantities
   — collect or prepaid freight bill

5. Have delivery person note any shortages or damages on all copies of the freight bill and bill of lading.

   NOTE: Notations must cover entire damage and include a description of merchandise and number of items damaged.

6. Place the damaged merchandise and delivery cartons together in case there is a question regarding the claim by the carrier.

   NOTE: Carrier will inform the store how to dispose of the damaged merchandise.

7. Manager and delivery person sign all copies of the freight bill.

8. Record shipment in receiving book.

OBJECTIVE 5

State guidelines for completing receiving records.

Direct merchandise is ordered from a vendor by a store. The store is invoiced from the vendor and merchandise is delivered to the store by:

-Vendor's truck
-Common carrier
-UPS
-Parcel post

Most mid-size and large retailers require all freight shipments be recorded upon receipt. The two documents you will be using in this process are:

FREIGHT BILLS—A freight bill is provided by the carrier and is used as proof of delivery. This gives a list of merchandise and contains information recorded in the receiving book.

RECEIVING BOOK—The Freight Receiving Book is used to record all shipments received by a store. Sometimes referred to as the Receiving Log.

GUIDELINES

- Keep the Receiving Book where merchandise is received.
- Fill in information on receipt of merchandise, fixtures or supplies.
- Use pages in sequential order.
- Void any ruined pages.
- Fill in the "Beginning Date" at the top of the page, when you start a new page.
- Record merchandise by individual vendor name.

DIAGRAM Below is an example of a completed Freight Receiving Book.

FREIGHT RECEIVING LOG

BEGINNING DATE ____________

Date	Vendor	No. of Cartons Received	Carrier	Cartons Short	Ppd (✓) or Collect	Charges	Received By
2/28/XX	Hospital Spec.	50	Jones	0	✓	221.44	
3/2/XX	Ostrow	4	ABF	0	Coll.	74.45	

PART INFORMATION AND SOURCE

1. Date shipment received
2. Vendor name - company shipping the freight
3. Number of cartons received - number of cartons received from same vendor
4. Carrier name - carrier's name, UPS, parcel post, vendor's truck, etc.
5. Cartons short - the difference between the number of cartons received and the number of cartons shown on the freight bill
6. Were the freight charges "prepaid" by the vendor? If yes, place a ( ) mark. If no, write in "collect."
7. Charges - amount of the freight charges.

   NOTE: Some vendors ship prepaid and add charges to the invoice. Compare the freight charges to the invoice.
8. Receiving person's name.

OBJECTIVE 6

State reasons for filing claims. (Supplement 1)

Most retailers will make a claim on any merchandise which was short or not delivered in good condition. In order for store management to process a claim it is necessary for store associates to recognize the types of claims which should be filed.

NOTE: Due to the expense involved in filing claims some retailers will file a claim only when it exceeds a predetermined dollar amount, for example, $25.

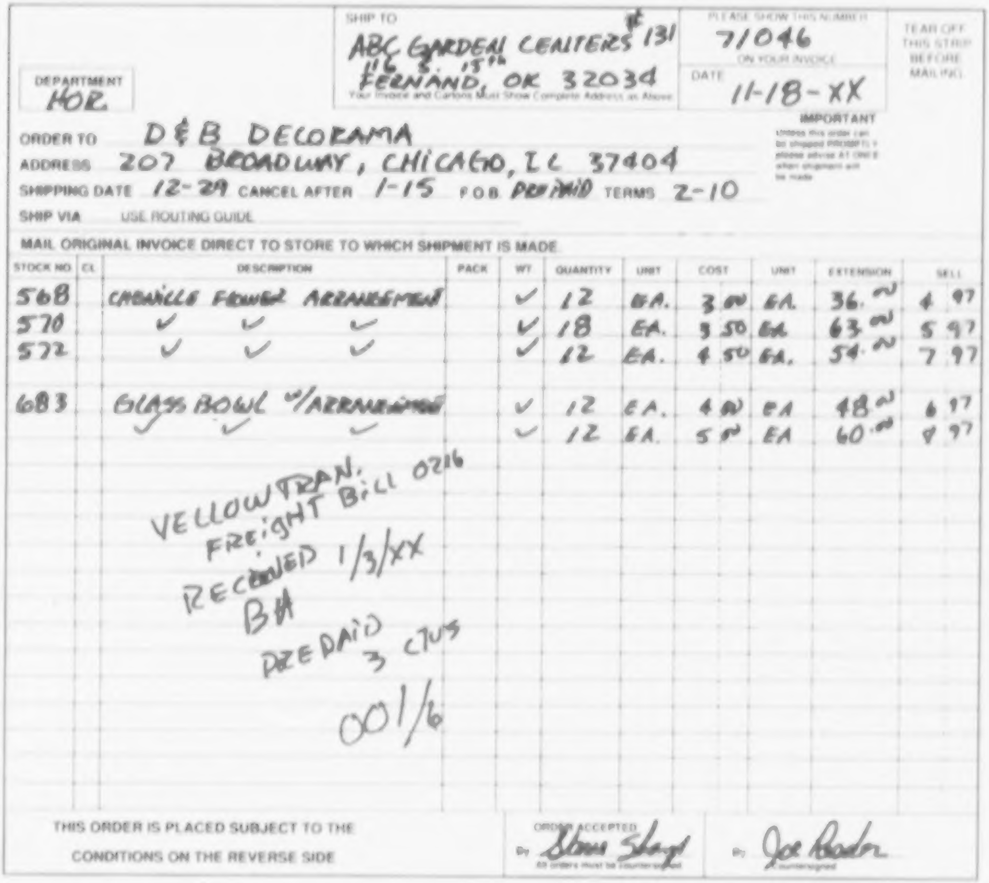
REASONS

Claims are filed for the following reasons:

- Damaged merchandise - this refers to merchandise that has been damaged since leaving the vendor. It is the carrier's responsibility to pay for any damage that occurs during shipping. Damage may be visible or concealed.
  - Visible damage refers to damaged cartons containing damaged merchandise.
  - Concealed damage refers to damaged merchandise in apparently unharmed cartons.
- Shortages - Shortage claims are filed against the vendor or carrier depending on the nature of the shortage.
  - Visible shortages are those where cartons were obviously lost during shipping. Visible shortage claims are always filed against the carrier.
  - Inner carton shortages are "packing errors" and a concealed shortage claim is filed against the vendor.

OBJECTIVE 7 **Arrange in order the steps to take when checking in merchandise.**

NOTE: Use a purchase order to "check-in" the merchandise you receive. Below is an example of a completed Purchase Order.



DEPARTMENT HOR

SHIP TO
ABC GARDEN CENTERS #131
116 S. 15th
FERNAND, OK 32034
Your Invoice and Cartons Must Show Complete Address as Above

PLEASE SHOW THIS NUMBER 71046 ON YOUR INVOICE

DATE 11-18-XX

TEAR OFF THIS STRIP BEFORE MAILING

IMPORTANT
Unless this order can be shipped PROMPTLY please advise AT ONCE when shipment will be made

ORDER TO D&B DECORAMA
ADDRESS 207 BROADWAY, CHICAGO, IL 37404
SHIPPING DATE 12-29 CANCEL AFTER 1-15 F.O.B. PREPAID TERMS 2-10
SHIP VIA USE ROUTING GUIDE

MAIL ORIGINAL INVOICE DIRECT TO STORE TO WHICH SHIPMENT IS MADE

STOCK NO.	CL	DESCRIPTION	PACK	WT	QUANTITY	UNIT	COST	UNIT	EXTENSION	SELL
568		CHENILLE FLOWER ARRANGEMENT		✓	12	EA.	3 00	EA.	36.00	4 97
570		✓ ✓ ✓		✓	18	EA.	3 50	EA.	63.00	5 97
572		✓ ✓ ✓		✓	12	EA.	4 50	EA.	54.00	7 97
683		GLASS BOWL w/ARRANGEMENT		✓	12	EA.	4 00	EA	48.00	6 97
		✓ ✓ ✓		✓	12	EA.	5 00	EA	60.00	8 97

YELLOW TRAN.
FREIGHT BILL 0216
RECEIVED 1/3/XX
BA
PREPAID
3 CTNS
001/6

THIS ORDER IS PLACED SUBJECT TO THE CONDITIONS ON THE REVERSE SIDE

ORDER ACCEPTED By
All orders must be countersigned

By
Countersigned

PROCEDURE

1. Verify the quantities of each item received to the quantities shown on the Purchase Order.

   NOTE: In the example above a ( ) mark is used to indicate the quantity received agrees with the Purchase Order. A "circle" is used to indicate the quantity received did *not* agree with the Purchase Order and the correct amount received is written in.

2. Calculate the selling price for each item.
3. Mark the merchandise in the appropriate manner.

4. Place the merchandise on display in the proper location.
5. Attach the freight bill and/or packing slip to the Purchase Order.
6. Sign and date the Purchase Order and return it to your store's office for processing.

OBJECTIVE 8

Select from a list guidelines used when pricing merchandise.

Pricing is an extremely important part of the total merchandising process. Frequently you hear retailers talking about price leaders, price lines, price points, markups and markdowns. There are two basic reasons why pricing is so important to the success or failure of a retail outlet.

- First, prices have the power to attract customers if they are "right." The majority of items advertised in newspapers are priced to attract and pull customers to the store.
- Second, retailers must set high enough retail prices on the merchandise they sell or they will not be able to pay their overhead expenses and make a profit.

Retailers sometimes keep the markup on some items low in order to build traffic, but they must make it up on other items to survive.

FACTORS AFFECTING PRICES

When determining prices you should take into consideration these factors:

1. Cost of merchandise
2. Overhead expenses
3. Desired profits

GUIDELINES

Use the following guidelines when setting prices:

- Select price lines that properly reflect your store's overall image.

  NOTE: A price line is the top, middle, and bottom prices at which a retailer offers a certain classification of merchandise to customers.

- Exercise care in setting the number of price points within a given line.

  NOTE: It is poor merchandising to have too many price points. A price point is the specific price of an item within a line.

- Merchandise should be marked up on an individual item basis.
- Devote sufficient attention to pricing and price adjustments.
- Identify your competitors and stay competitive.

OBJECTIVE 9 **Match markup theories to the correct explanation.**

There are many principles or practices to follow when it comes to markups. The following ones will give you some insight into the complexity of determining markups.

- *The Keystone Principle.* Keystone is a trade term that means "double the price." If a retailer pays $5.00 for something and sells it for $10.00, he has taken a keystone markup. This is sometimes referred to as the "lazy" markup. It does not allow for individual markup selection and it ignores what competitors are selling the identical merchandise for. Small, less sophisticated retailers are the primary advocates of this practice.
- *Trade Acceptance Principle.* Particular markup percentages are practiced in certain trade areas. For example, the traditional markup in hardware items is 40 percent of the retail price. So, if a retailer pays $6.00 for a hammer, he would sell it for $10.00. Those who follow this formula simply want to be competitive with others in the trade and do not want to be bothered with individual item analysis.
- *What the Market Will Bear Theory.* Those who recommend this approach state that you should always get the highest possible price for any item as long as you don't drive the customer away. They believe in the law of supply and demand. These retailers usually specialize in items that are unfamiliar to customers and not handled by competitors. Many of these retailers would rather sell less at higher prices than more at lower prices.

- *The High Start/Quick Dropback Theory.* This theory has overtones of the "What the Market Will Bear Theory." It differs, however, in that retailers who are adherents of this theory desire immediate reaction from the market and are willing to drop back to a lower price to get mass distribution. These people also like the idea that they can legally advertise that an item which was regularly offered at a much higher price is now offered at a much lower price.

- *Price Market Penetration Theory.* Some retailers set pricing on the basis of achieving volume sales at different price levels. For example, a store might anticipate getting 10 percent of the market on car batteries at one price, say $49.00, and anticipate 15 percent of the market at a price of $42.00. The lower the price, the greater the market penetration. Those who interpret and calculate correctly can gain greater volume with little loss in gross profit; those who make mistakes lose gross profit without a corresponding increase in sales.

OBJECTIVE 10 **Arrange in order the steps to determine the retail price.**

An important responsibility for any retailer is to ensure that each item carried within the store is properly priced for resale. When determining the retail price, it is necessary to consider such things as:

- Cost of merchandise sold
- Desired markup
- Turnover rate
- The store's competition

Most retailers add the shipping charges on to the cost of the merchandise before figuring markup. This "total" cost is referred to as the "landed cost."

PROCEDURE

Use the following steps to determine the selling price when you know the desired markup on the items.

1. Determine the cost of a single item by dividing the number of items received into the landed cost.

   EXAMPLE: 72 stable halters; $286.56 landed

   Cost

   $286.56 divided 72 = $3.98

   The actual cost of one halter is $3.98

2. Assume you want the halters to show a 60 percent markup. Begin by subtracting the percentage of markup you want from 100 percent, which represents the selling price percentage.

   100% - 60% = 40%

3. To determine the selling price of the halter, divide the "answer" (40 percent) into the actual cost of the halter.

   $3.98 divided 40% = $9.95

   The answer - $9.95 - is the price at which you would have to sell the halter in order to have a 60 percent markup of the retail price.

   Selling price $9.95

   Cost 3.98 = 40 percent of retail
   Markup 5.97 = 60 percent of retail

   NOTE: One reason retailers figure markup as a percentage of selling price is that it helps them keep in mind the gross profit required. In this way fewer markup mistakes are made.

OBJECTIVE 11

Distinguish between characteristics of the types of inventory systems. (Transparency Master 2)

No matter how carefully kept, neither book nor computer inventory figures have eliminated the need for periodically taking a complete physical count of all the merchandise in the store. This must be done for income tax purposes, to figure profit and loss and to determine the amount of shrinkage.

Most organizations take a physical inventory at least once a year—those with fast turnover take them more frequently. Those stores with limited inventories or easy to count merchandise can rather quickly take a physical inventory, but it is a different matter for those with thousands of items. In the past those with large inventories depended on cumbersome and expensive dollar and unit control systems. In some merchandise classifications they were satisfied to control only the dollar amounts invested in the departments. This is referred to as dollar control.

A second approach is to keep track of each item (stock number, style, size, color, and price). This is called unit control.

Either way, elaborate "bookkeeping" systems were needed in order for the management to have a "perpetual inventory system." The advantage of a "perpetual inventory system" is that a merchant is able to quickly determine what is "in stock" without having to do a physical count.

TYPES OF SYSTEMS

Listed below are the characteristics of the two types of inventory systems.

- Manual inventory systems
    - Minimum system for inventory control.
    - Inventory control cards are generally maintained as a data base.
    - Separate records are maintained for each item in inventory.

      EXAMPLE: Inventory control cards
- Electronic inventory system
    - Computer system may be located within the business or may be a leased service.
    - Generally used when a large number of items are maintained in inventory

      NOTE: Hand-held mini-computer systems (sometimes referred to by the tradename, TELXON) make it possible to reorder merchandise much faster than manual systems.

  Scanner systems greatly speed up inventory systems.

OBJECTIVE 12

Read cost codes. (Transparency Master 3)

Many stores use cost codes on their price tags. This is a common method of concealing the cost of the merchandise from the customers. It keeps customers from feeling the store has marked up the merchandise too much and at the same time allows for physical inventory counts to be taken on a cost basis directly from the price tags. This is particularly helpful when the store uses a variety of markup percentages.

CODES

A cost code that has been used by smaller retailers for many years is shown below.

B	L	A	C	K	H	O	R	S	E
1	2	3	4	5	6	7	8	9	0

Word code devices always contain 10 letters. The first letter of the first word is designated as the number "1." Each letter is numbered consecutively "2", "3" and so on, through "9." The tenth letter is "0."

EXAMPLE:

Item	Cost Code	Decoded Amount
Leather jacket	CKKE	$45.50

NOTE: Some other word codes that have been used by retailers are:

- FOUR PLAYED
- REPUBLICAN
- PRUDENTIAL
- MONEY TALKS

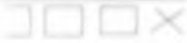
Another company uses a tic-tac-toe grid cost code system.

EXAMPLE:

1	2	3
4	5	6
7	8	9

and "x" = 0

EXAMPLE:

Item	Cost Code	Decoded Amount
Leather jacket		$45.50

OBJECTIVE 13

Select from a list guidelines for taking a physical inventory.

Inventory is that time when a retailer makes a physical count of all the merchandise on hand. Completing an accurate count is a time consuming task and takes the cooperation of all employees.

GUIDELINES

Use the following guidelines to ensure your inventory is taken accurately and with a minimum of stress.

- Keep in mind the importance of an accurate count.
- You are to concentrate totally on counting—and alone to minimize mistakes.
- Refrain from talking during the counting.
- Before starting the inventory do some test counts and check for accuracy.
- If you start making frequent errors, stop counting.
- Spot check counts for accuracy frequently.
- Put a count ticket on each group of merchandise working left to right and top to bottom.
- Make separate tickets for each color, flavor, size of like items, even when displayed side by side.
- Spot check counts for accuracy before pulling the inventory slips.
- Check each counter, table, rack, etc. to ensure everything was counted.

OBJECTIVE 14

Select from a list statements about inventory control guidelines.

Inventory control is a complex subject and each store develops its own system. Generally speaking, use the following guidelines to control inventory.

- Invest in inventory according to a sound merchandise plan.
- Maintain accurate, up-to-date records.
- Use records as a data base for decision making.

- Purchase the proper assortment of goods in quantities that will maintain inventory levels consistent with customer demand.
- Provide safety stocks to prevent stockouts caused by unexpected demand or delays in shipments.
- As sales in one classification increase, build up your inventory; as sales in a classification decrease, slow down your reorders.
- Take prompt action to correct inventory imbalances so that capital created may be invested in merchandise with greater market potential.

OBJECTIVE 15

Match terms associated with discounts and payments due to the correct definitions.

It is advisable for businesses to take advantage of discounts from manufacturers whenever possible. Discounts may be based on services performed, shipping method and/or date of payment.

Listed below are explanations and examples of the various discounts and shipping terms common in retailing.

- **Cash discount**—Deduction given if full payment is made early

  EXAMPLE: 2/10, N/30 means that a 2% discount may be taken if the merchandise is paid in full within 10 days from the date of the invoice. If the merchandise is not paid within 10 days, the net amount is due within 30 days of the invoice date.

- **Trade discount**—Special deduction from the list price stated in the catalog

  NOTE: Changing the discount serves as a simple method of adjusting prices to retailers and wholesalers in a changing market. This is less complicated and less costly than frequently reprinting price lists and catalogs.

- **Seasonal discounts**—Special discounts offered to those who place orders well in advance of the normal buying season
- **Promotional discount**—Allowance for advertising the merchandise

- **Chain (series) discount**—Two or more discounts from the list price

  NOTE: These are deducted one at a time.

  EXAMPLE: If a 10% trade discount and a 5% cash discount were allowed on a $100 purchase, the 10% discount would be subtracted from the $100, leaving $90. The 5% discount would be subtracted from the $90, leaving the cost of the merchandise $85.50.$100 x .10 = $10, $100 - $10 = $90

  $90 x .05 = $4.50, $90 - $4.50 = $85.50

- **E.O.M. (end of month)**—Discount period beginning at the end of the month in which the invoice is dated

  EXAMPLE: 3/10, N/30, EOM means a 3% discount may be taken if the merchandise is paid for within 10 days after the end of the month of the date of the invoice. If the merchandise is not paid within this time, the net amount is due within 30 days after the end of the month in which the merchandise is invoiced.

- **R.O.G. (receipt of goods)**—Discount period begins the day the merchandise is received by the store, rather than beginning on the invoice date

  EXAMPLE: 2/10, N/30 ROG means a 2% discount may be taken if the merchandise is paid for within 10 days of the date the goods are received in the store. If the merchandise is not paid within this time, the net amount is due within 30 days from the date the goods are received.

- **Extra dating**—Additional days, designated by an "X", given to the buyer before payment is due

  EXAMPLE: N/30, 60X means the total payment is not due for 90 days.

- **Advance dating (post dating)**—Payment of merchandise computed from a date after the merchandise is shipped

  NOTE: This is done to encourage buying before the rush season begins.

  EXAMPLE: Merchandise may be shipped in February but the invoice is dated May 4.

- **F.O.B (free on board)**—Point in the transfer of merchandise where the person buying the merchandise begins paying the shipping costs

  EXAMPLE: "F.O.B. Chicago" means the shipping costs were paid by the manufacturer until the merchandise reached Chicago. The person buying the merchandise started paying the shipping costs from Chicago. "F.O.B. Destination" means that all shipping costs will be paid by the manufacturer.

- **Consignment**—Merchandise remains the property of the seller and is paid for after it has been sold; any unsold merchandise may be returned to original seller if it is in good condition

  NOTE: The term "on memorandum" is very similar to consignment selling except the buyer does own the title to the goods.

PROCEDURES FOR FILING CLAIMS

DAMAGED FREIGHT

Damage may be visible or concealed. Visible damage refers to damaged cartons containing damaged merchandise. Concealed damage refers to damaged merchandise in apparently unharmed cartons.

VISIBLE DAMAGE CLAIM PROCEDURE

The steps listed below are typical of those most retailers use when filing visible damage claims.

1. Accept the visibly damaged shipment.
2. Open and inspect the damaged cartons.
3. Does time permit a full inspection of the damaged cartons? If no, go to Step 4 and conduct a general inspection. If yes, go to Step 5.
4. Conduct a general inspection. Have driver make a general notation of the damages of the freight bill and sign his or her full name. Go to Step 6.
5. Conduct a full inspection. Have driver note on freight bill every damaged item and a full description of the damages.

   NOTE: Do not consolidate information. Have driver sign his or her full name.
6. Inform your manager of the damaged shipment.

   NOTE: Your manager will call the carrier to have them make an inspection of the shipment and/or pick it up.

   A carrier will not recognize any items not listed on the freight bill unless the claim is accompanied by an Inspection Report.
7. If the carrier does not respond to the phone call within 24 hours, send the appropriate written notice:

   - Notice to carrier to make inspection
   - Notice to carrier to pick up damaged merchandise
   - Keep copies of the "Notice(s)" sent with the claim.

674

8. Store the damaged merchandise and the shipping cartons where they will be readily available for inspection.

   NOTE: Everything must be on hand until the claim is paid or the merchandise is picked up.

9. Fill out a damaged merchandise receipt when the merchandise is picked up.

10. Complete the claim form and attach the following supporting documents:

    - Invoice
    - Freight Bill
    - Bill of Lading
    - Inspection Report
    - Notice(s) to Carrier
    - Damaged Merchandise Receipt

11. Transmit the claim and attachments to your store's office processing.

CONCEALED DAMAGE CLAIM PROCEDURE

Use the following steps when you discover concealed damage:

1. Inform your manager regarding the damaged merchandise.

   NOTE: Your manager will call the carrier and ask them to make an inspection.

2. Store the merchandise and shipping cartons where they will be readily available for inspection.

3. Send a "Notice to Carrier to Make Inspection," if he or she does not respond to the phone call within 24 hours.

   NOTE: The Request for Inspection must be made in 15 days from date of delivery or the carrier cannot be held liable for the damages.

4. Assist the carrier's inspector as he or she examines the shipment.

5. Accept the Inspection Report of Loss or Damage from the inspector.

6. Call the carrier after the inspection to request that the merchandise be picked up.

7. Send a "Notice to Carrier to Pick Up Damaged Merchandise." If the carrier has not responded to the phone call within 24 hours.

8. Complete the claim forms and attach proper documentation. Transmit to your store's office for processing.

SHORTAGES

Merchandise that is charged to your store but does not arrive is considered short. A claim must be filed so that the store can receive credit for the merchandise. Claims are filed against the carrier for visible carton shortages and filed against the vendor for concealed shortages (packing errors).

VISIBLE SHORTAGES CLAIM PROCEDURE

Many retailers use the following steps when the number of cartons shipped by the vendor are visibly short at the time of delivery.

1. Have driver note the number of cartons short on the Freight Bill and sign his or her full name.

2. Inform your manager of the shortage.

3. Complete a carrier claim form. You will be asked to provide the following information:

   - Carrier's name
   - Shipper's name
   - Freight Bill number
   - Did you receive the number of cartons shown on the Bill of Lading and/or Delivery Receipt?
   - How many cartons received
   - Invoice number, date, and amount
   - Description of each item short

4. Attach supporting documents

   - Invoice
   - Freight Bill
   - Bill of Lading

5. Transmit documents to your store's office for processing.

6. Notify your store's office promptly if the merchandise arrives after filing the claim.

CONCEALED SHORTAGE CLAIM PROCEDURE

The following steps are typical when you discover concealed shortages/packing errors.

1. Obtain a copy of the invoice covering this shipment.
2. Verify the items and quantities received against those listed on the invoice.

   NOTE: Back orders and substitutions are not considered shortages. Partial orders are not short if the invoice lists only those items shipped.
3. Was the shipment short? If no, process the order and invoice as usual. If yes, notify your manager and go to the next step.
4. Prepare vendor claim form:
   - Carrier's name
   - Shipper's name
   - Freight Bill number
   - Did you receive all of the cartons on the Bill of Lading?
   - How many cartons received
   - Invoice number, date and amount
   - Description of each item
5. Attach supporting documents and transmit to your store's office for processing.

MARKUP TABLE

Frequently retailers use a table or "Profitmeter Wheel" to simplify the calculations of retail selling prices. Below is an example of a typical table used to determine selling prices.

Desired Markup %--Selling Price	Corresponding % of Cost
50.0%	100.0%
42.8%	75.0%
40.0%	66.4%
33.0%	50.0%
30.0%	42.9%
25.0%	33.3%
20.0%	25.0%
16.7%	20.0%
10.0%	11.1%
9.0%	10.0%
5.0%	5.3%

PROCEDURE

Use these steps to calculate the selling prices.

1. Locate the desired markup percentage based on selling price in the left-hand column.
2. Multiply the cost of the item by the corresponding percentage of cost in the right-hand column.

3. Add the result to the cost of the item to determine the selling price.

   EXAMPLE: You have a shipment of boots that cost $40.00 a pair and you want them to show a 40% markup. To determine the selling price, your steps would be:

   a. 40% corresponds to 66.4% on the chart

   b. $40.00 x 66.4% = $26.56

   c. $40.00 + $26.56 = $66.56

   In this example you would probably want to round the price off...$66.44, $66.59 or $66.95, depending on your store's pricing policy.

REASONS FOR CONTROLLING INVENTORY LEVELS

The most difficult and misunderstood challenge in retailing is inventory control. First, retailers are expected to have what the customers want and not what they do not want. Second, retailers must have these products in just the right amounts...neither too little or too much. Accomplishing this balancing act is not easy.

The *Enough but Just Enough Principle* applies here. It states that the retailer must have enough of what the customer wants, but just enough. Any merchandise that continues to sit on the shelf reduces the profit the store made on the items that sold quickly.

Assume you operate a western wear and tack shop. You provide your customers with several styles and in sizes small, medium, large, and extra large. This is a basic item. You have calls for t-shirts every day. Your reorder time, from a dependable resource is 30 days. This vendor is close so freight costs are minimal. No matter how many t-shirts you buy in a single order, no quantity discounts are available.

What controls should you have on your inventory? How many t-shirts should you have on hand at any given time? The *Enough but Just Enough Principle* applies.

Here is how it might work out in practical application.

Assume that last month you sold the following t-shirts:

Small	Medium	Large	Extra Large
16	20	24	12

679

Keeping in mind your 30-day reorder period, you decide you would like to have a ten-shirt cushion in each size category. That is, when each size is down to ten shirts you want an order to arrive to build you back up to your 30-day level again. In this way, you should never run out of shirts in any of the sizes and you would, at the same time, not have an excess.

Why shouldn't you give yourself more protection than ten shirts? Why not order twice as many to make sure? Why operate on such a tight inventory?

There are several reasons.

1. *You would waste money.* As a small retailer you only have so much money to operate on, so if you put too much money in one classification of merchandise you might have to short another or even do without some products your customers want. If you put more money in t-shirts than you need, the extra amount is non-productive; it is not even drawing interest as it would if it had been deposited in the bank.
2. *You decrease your turnover.* If your average inventory (at retail) in halters is $1,516.00 and your sales amount is $8,616 per year, your turnover figure is 5.7; if your average inventory is $2,154.00 and your sales are the same, your turnover is only 4.0. The faster the turnover, the more efficient and profitable the retail operation.
3. *You face possible merchandise deterioration.* This possibility is easy to see if we switch from halters to vaccines. If a vet over orders vaccines they might expire before they are purchased and have to be discarded. Many other kinds of merchandise deteriorate or go out of style if left on the shelf too long.
4. *You may lose in other ways.* a) The more excess inventory you have, the more space you need. b) The larger your inventory, the more taxes you may pay. c) The larger your inventory, the greater possibility of thefts. d) Should you decide to switch from one kind of merchandise to another, the more you have on hand when you make such a decision, the more difficult it would be to switch.

Markup on Selling Price vs Markup on Cost

Selling Price	Cost	Initial Markup	Markup % on Selling Price	Markup % on Cost
$50	$20	$30	60%	150%
$50	$25	$25	50%	100%
$50	$30	$20	40%	66.7%
$50	$35	$15	30%	43%
$50	$40	$10	20%	25%

Perpetual Inventory Card

PERPETUAL INVENTORY CARD

Item: Coveralls #292

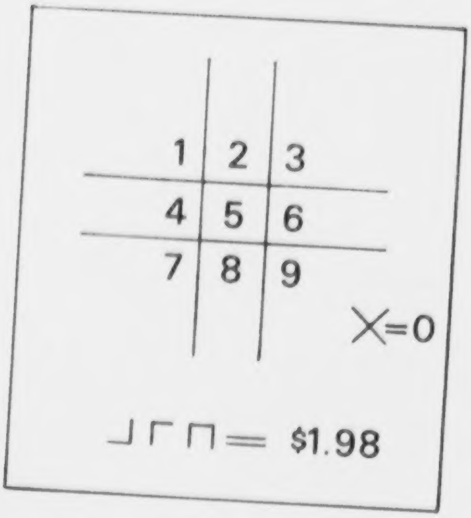
Date	Pur. Req. or Stock Req. No.	Put in Stock	Withdrawn	Balance
4/4/--	325	600		600
4/10/--	1271		100	500
4/11/--	612		200	300
4/14/--	7700	1,000		1,300
5/10/--	033		350	950

683

684

TM 3

Cost Codes


1 2 3
4 5 6
7 8 9
X=0
┘┌⊓ = $1.98

123456 7890
SPRING LAMB

SMA = $1.98

1234 567890
MAKE PROFIT

MIF = $1.98

Want Slip

Want Slip

Date ______________

Dept. No. __________

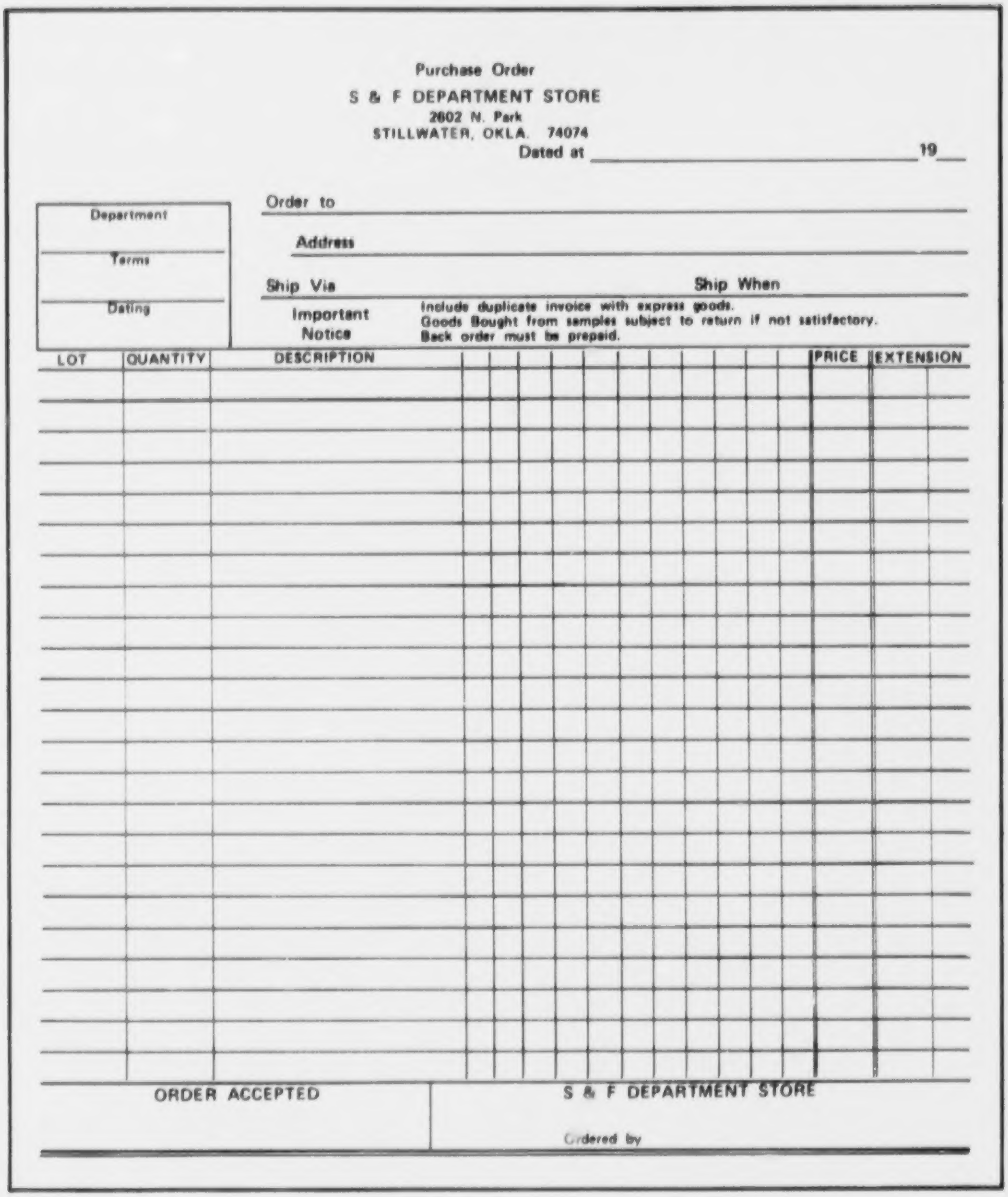
Employee No.________

Keep this slip in your salesbook. Whenever an item is called for that is not in stock, whether carried regularly or not, record that fact at once. Make certain that you record every call. If the customer requested a special order, fill out the "Special Order Request."

ITEM CALLED FOR	WANTED				Order Taken	Subst. Sold	Sale Lost	Buyer's Disposition
	Style	Color	Size	Price				

TO THE SALESPERSON: Write plainly, put one copy in the index and give one copy to your Department Manager.

Purchase Order



Purchase Order
S & F DEPARTMENT STORE
2602 N. Park
STILLWATER, OKLA. 74074
Dated at ______________________ 19___

Department
Terms
Dating

Order to ______________________
Address ______________________
Ship Via ______________ Ship When ______________

Important Notice
Include duplicate invoice with express goods.
Goods Bought from samples subject to return if not satisfactory.
Back order must be prepaid.

LOT	QUANTITY	DESCRIPTION	PRICE	EXTENSION

ORDER ACCEPTED

S & F DEPARTMENT STORE
Ordered by ______________________

688

ASSIGNMENT SHEET 1

MERCHANDISING

NAME ______________________________ SCORE ________

OBJECTIVE 16 **Apply formulas used in pricing merchandise.**

INTRODUCTION A very important role for any retail manager or buyer is to ensure that each item carried within the store is properly priced for resale. When determining the retail price, it is necessary to look at such things as cost of merchandise sold, desired markup, turnover rate and the store's competition. Merchants use basic formulas to determine retail price, markup, markdown, cost price, and percentages of markup and markdown. Formulas use basic mathematical computations: adding, subtracting, multiplying, and dividing are all used in pricing merchandise.

DIRECTIONS In this assignment you are given several problems and a formula sheet. Study the formula sheet, ask any questions you may have, and then answer the problems.

NOTE: The formula sheet is the next page.

PRICING FORMULAS

Use the following formulas in pricing merchandise.

Given	To Find	Procedure
Cost price, retail price	Markup in dollars	Subtract cost from retail
Markup in dollars, retail price	Cost price	Subtract markup from retail
Markup in dollars, cost price	Retail price	Add cost and markup
Retail price, markup in dollars	Markup percentage (retail)	Divide markup by retail
Cost price, markup in dollars	Markup percentage (cost)	Divide markup by cost
Cost price, original retail selling price	Initial markup	Subtract cost price from original retail selling price
Cost price, final sales price	Maintained markup	Subtract cost price from final sales price
Retail price, markup percentage (M%)	Cost price	Multiply retail price by (100% - M%)
Cost price, markup percentage (M%)	Retail price	Divide cost by (100% - M%)
Estimated expenses, profits, price reductions, sales	Initial markup	Add expenses, profits, and price reductions; divide this figure by (Sales + Reductions)
Original retail selling price, final sales price	Markdown	Subtract final sales price from original retail price
Dollar markdown, total sales	Markdown percentage	Divide dollar markdown by total sales

EXERCISE

1. Figure retail price using the following information.
   a. Cost price $115.00; markup in dollars $15.00
      Answer ____________
   b. Cost price $2.69; markup in dollars $2.00
      Answer ____________
   c. Cost price $2.55; markup in percent 15%
      Answer ____________
   d. Cost price $1.95; markup in percent 15%
      Answer ____________
2. Figure cost price using the following information.
   a. Retail price $7.25; markup in dollars $2.00
      Answer ____________
   b. Retail price $15.95; markup percent 25%
      Answer ____________
3. Figure markup in dollars using the following information.
   a. Retail price $14.95; cost price $10.74
      Answer ____________
   b. Retail price $60.00; cost price $52.00
      Answer ____________
4. Figure markup as a percentage of retail price using the following information.
   a. Retail price $50.00; markup in dollars $20.00
      Answer ____________
   b. Retail price $124.00; markup in dollars $54.00
      Answer ____________

691

5. Figure markup as a percentage of cost price using the following information.

   a. Cost price $25.00; markup in dollars $25.00

      Answer ____________________

   b. Cost price $1.00; markup in dollars $1.39

6. Figure initial markup using the following information.

   Answer ____________________

   a. Cost price $.69; original retail price $1.00

      Answer ____________________

   b. Cost price $4.00; original retail price $6.50

      Answer ____________________

ASSIGNMENT SHEET 2

MERCHANDISING

IX

NAME ______________________________ SCORE _______

OBJECTIVE 17

Calculate inventory extensions.

INTRODUCTION

There are two basic methods for recording inventory onto inventory forms: retail price method and cost code method.

Amounts are calculated and recorded in the extension columns of the inventory worksheet. Most retail stores record inventory at retail and then convert it to cost for final extension.

Since cost is the most accurate amount for management to consider when examining records, the total cost amount becomes the critical figure in inventory management.

PROCEDURE

Use these steps for recording information on an inventory sheet.

Retail Price Method

1. Record the retail prices of merchandise.
2. Multiply the retail price of each item by the quantity on hand at the time of the inventory count.
3. Add total retail value for each item to arrive at the total retail inventory.
4. Multiply total inventory at retail by the markup percentage to arrive at the total markup.
5. Subtract the total markup from total inventory at retail to arrive at the total inventory at cost.

EXAMPLE:

20 items at $2.00 @=	$ 40.00
50 items at $5.00 @=	250.00
40 items at $1.00 @=	40.00
Inventory at retail	$330.00
Inventory at retail	$330.00
25% Markup	x .25
Total markup	$ 82.50
Inventory at retail	$330.00
Total markup	- 82.50
Total inventory at cost	$247.50

Cost Code Method

1. Record the costs of merchandise taken from the cost codes on price tags.
2. Multiply the cost of each item by quantity of items on hand at the time of the inventory count.
3. Add total cost for each item to arrive at the total inventory at cost.

EXAMPLE:	20 items costing $2.00 @ =	$ 40.00
	20 items costing $5.00 @ =	100.00
	300 items costing $1.00 @ =	300.00
	Inventory at cost	$440.00

DIRECTIONS

In this assignment, you are given partially completed inventory forms. Calculate the extension amounts as indicated on each form. Write your answers in the spaces provided. Use the Information Sheet for reference as needed.

Part I

Calculate inventory extensions using the retail price method.

INVENTORY WORKSHEET

Retail

INVENTORY WORKSHEET

Department Small Appliances Date Today's date

Line #	Description	Quan.	Retail Price	Markup	Retail Extension	Cost Extension
1	3-way hairsetter HCD4	7 ea.	$27.98	40%		
2	Deluxe hairsetter 1546	11 ea.	25.95	50%		
3	Minisetter HCD8	9 ea.	23.95	40%		
4	Custom Care Setter KF20	10 ea.	39.99	40%		
5	Prodryer 1400	14 ea.	24.98	40%		
6	Superdry 5124	15 ea.	39.95	50%		
7	Dryer Current MD42	12 ea.	23.99	40%		
8	Dry One MRD 38	10 ea.	19.99	50%		
9	Dry Yer Hair DR69	13 ea.	23.69	50%		
				TOTAL(S)		

Part II

Calculate inventory extensions using the cost code method.

INVENTORY WORKSHEET

Cost form

INVENTORY WORKSHEET

Department Jewelry & Clocks Date Today's date

Line #	Description	Quan.	Unit	Cost	Extension
1	Anniversary Clock G610	6	each	$88.93	
2	400-day Anniversary Clock G824	4	each	82.90	
3	Electronic Strike Mantel Clock G825	3	each	76.44	
4	Waterbury Chime Mantel Clock E111	4	each	162.47	
5	Triple Chain Mantel Clock F92	7	each	211.74	
6	Quartz Boutique Alarm Clock G475	2	each	49.57	
7	Quartz Oval Wall Clock F12	3	each	44.83	
8	Rattan Decorator Clock G610	5	each	43.60	
9	Mason Cuckoo Clock E211	6	each	37.95	
				TOTAL	

ASSIGNMENT SHEET 3

MERCHANDISING

IX

NAME ______________________________ SCORE ______

OBJECTIVE 18

Compute open-to-buy.

Open-to-buy is the merchandising term that describes the amount of money that the department manager has to spend on merchandise at any point during the season. Open-to-buy is determined through careful planning. It is important that the department manager have money throughout the season to purchase goods for the store. Should the store overstock its inventory or otherwise tie up all capital, it would be nearly impossible for the buyer to maintain an adequate open-to-buy.

It is possible, therefore, for the store to be forced into a position where there is insufficient money to purchase the proper merchandise to maintain an adequate merchandise mix throughout the season. This could result in loss of sales and customers.

In this assignment you will use the open-to-buy formula to determine open-to-buy in several situations. Use the procedure described below to calculate open-to-buy.

Part I

OPEN-TO-BUY FORMULA

Use the following steps to determine your open-to-buy.

1. Calculate total stock needed during the month.

EXAMPLE:	$6,000	Planned sales for the month
	+3,000	Desired stock at E.O.M.
	$9,000	Total stock needed during month

2. Determine current stock allowing for delays in getting merchandise to the store.

EXAMPLE:	$2,000	Merchandise in stock at present
	+ 500	Merchandise on order
	$2,500	Current stock

3. Calculate amount of stock to be purchased.

EXAMPLE:	$9,000	Total amount of stock needed
	-2,500	Current stock
	$6,500	Amount of stock to be purchased (Open-to-buy)

Part II

EXERCISES

1.

$20,000	Planned sales for month
$ 8,000	Desired stock at end of month
$12,000	Merchandise in stock at present
$ 500	Merchandise already on order
	Answer

2.

$12,000	Planned sales for month
$ 1,500	Stock desired at end of month
$ 4,000	Merchandise in stock at present
$ 1,000	Merchandise already on order
	Answer

3.

$18,000	Planned sales for month
$ 6,000	Stock desired at end of month
$ 2,000	Merchandise is stock at present
$ 250	Merchandise already on order
	Answer

ASSIGNMENT SHEET 4 — MERCHANDISING — IX

NAME ______________________________ SCORE _______

OBJECTIVE 19 **Calculate discounts and payments due.**

INTRODUCTION

Manufacturers often offer discounts to their customers. Those discounts may take the form of trade discounts, seasonal discounts, promotional discounts and/or cash discounts. Further savings may be available to the buyer by arranging for shipping costs to be paid by the manufacturer. It is advisable for businesses to take advantage of these benefits whenever possible.

DIRECTIONS

In this assignment you will compute discounts and shipping costs for a variety of situations. Read each problem and answer the questions given. Use the formula sheets that follow for reference.

Part I

Discounts and payment due formulas

A. Cash discount formula

NOTE: This is a standard discounting formula. It is also used in calculating trade discounts, seasonal discounts, and promotional discounts.

EXAMPLE: If an invoice, dated December 1, has a net due of $1,000 and carries discount terms of 2/10, N/30, the business may pay $980 if payment is made by December 11—OR—the net amount of $1,000 must be paid not later than December 31 if the discount is not taken.

1. Determine due dates

   a. Discount date = December 11 (December 1 + 10 days)

   b. Final payment date = December 31 (December 1 + 30 days)

2. Calculate discounted amount due

   a. $1,000 Net invoice amount due
   x .02 2% discount rate
   $20.00 Discount

b.

$1,000	Net invoice amount due
- 20	Discount
$ 980	Discounted amount due

B. E.O.M. discount formula

EXAMPLE: If an invoice, dated August 15, has a net due of $100 and carries discount terms of 3/10, N/30, E.O.M., the business may the pay $97 if the invoice is paid in full by September 10—OR—the business must pay $100 by September 30 if the discount is not taken.

1. Determine due dates

   a. Discount date = September 10

      1) The lst day of the invoice month is August 31

      2) September 10 (August 31 + 10 days)

   b. Final payment date = September 30 (August 31 + 30 days)

2. Calculate discounted amount due

   a.

$ 100	Net invoice amount due
.03	3% discount rate
$ 3.00	Discount

   b.

$100	Net invoice amount due
- 3	Discount
$ 97	Discounted amount due

NOTE: Save this sheet for future reference. DO NOT turn it in to your instructor.

701

C. Extra dating formulas

EXAMPLE: If a $1,000 invoice is dated February 2 and carries terms of 5/10, N/30, 30X, the business may pay $950 if paid in full by February 12—OR—the business must pay $1,000 by April 3 if the discount is not taken.

1. Determine due dates

   a. Discount date = February 12 (February 2 + 10 days)

   b. Final payment date = April 3

      1) March 4 (February 2 + 30 days)
      February 28 - 2 = 26 days left in February plus 4 additional days in March)

      2) April 3 (March 4 + 30 days)
      (March 31 - 4 = 27 days left in March plus 3 additional days in April)

2. Calculate discounts amount due

   a. $1,000 Net invoice
   x .05 5% discount rate
   $50.00 Discount

   b. $1,000 Net invoice amount due
   - 50 Discount
   $ 950 Discounted amount due

D. R.O.G. formula

EXAMPLE: If a shipment is received on March 31 and carries a $100 invoice, dated March 20, with discount terms of 2/10, N/30, R.O.G., the business may pay $98 if the invoice is paid in full by April 10—OR—the business must pay $100 by April 30 if the discount is not taken.

1. Determine due dates

   a. Discount date = April 10 (March 31 + 10 days)

   b. Final payment date = April 30 (March 31 = 30 days)

2. Calculate discounted amount due

   a. $ 100 Net invoice amount due
   x .02 2% discount rate
   $2.00 Discount

   b. $100 Net invoice amount due
   - 2 Discount
   $ 98 Discounted amount due

NOTE: Save this sheet for future reference. DO NOT turn it in to your instructor.

E. Chain (series) discount

EXAMPLE: If a $100 invoice carries a chain discount of 10%, 5%, the amount due would be $85.00.

1. Determine due dates as discussed in previous discount formula(s)

2. Calculate discounted amount due

   a. $ 100 Invoice amount due
   x .10 First discount rate
   $10.00 First discount

   b. $100 - $10 = $90 First discounted amount

   c. $ 90 First discounted amount
   x .05 Second discount rate
   $4.50 Second discount

   d. $90.00 First discount amount
   - 4.50 Second discount
   $85.50 Discounted amount due

EXERCISE

1. A store receives a shipment of merchandise for $300. The invoice is dated April 15 and shows the terms 3/10, N/30.

   a. When must the shipment be paid for in order to be eligible for the discount?

   b. What amount is due if the discount is taken?

   c. What is the date for payment?

2. Merchandise was shipped August 15 worth $3,000 with terms 2/10, N/30, FOB destination.

   a. If the bill was paid on the last day the cash discount could be taken, on what date was the bill paid for?

   b. What was the amount of the payment?

3. The manufacturer's suggested list price on an item is $25.00. A trade discount of 35% is offered to the retailer. What is the cost per item for the retailer?

4. Merchandise was shipped July 15 and was billed at $2500 with terms of 2/10, N/30, FOB destination. The bill was paid on the last day the discount could be taken.

   a. On what date was the bill paid?

   b. What was the amount of the check?

5. The manufacture's suggested list price on an article is $6.00. A trade discount of 40% is offered to the retailer. What is the cost to the retailer?

6. A store received a shipment of merchandise for $150.00. The invoice is dated March 15 and shows the terms 3/10, N/30, EOM.

   a. When must the invoice be paid in order to be eligible for the discount?

   b. What is the amount due if the discount is taken?

   c. What is the last date for full payment?

7. A store receives trade discounts of 20%, 10% and 5% on purchase of $3,780. The invoice carries terms of 2/10, N/30 and is dated April 10. If the bill is paid April 18, how much will it be?

8. An invoice is dated July 2 and has terms 4/10, 60X. What is the final date the cash discount may be taken?

9. A buyer receives chain discounts of 25%, 10%, 5% on a purchase of 200 dozen imported bulbs. If the bulbs are $23.50 a dozen, how much should the buyer pay for the entire shipment?

10. An invoice for $200 is dated April 14 and shows terms of 5/10 ROG. The merchandise is received on April 16.

    a. What is the last day the discount may be deducted?

    b. How much should be paid at that time?

NAME ______________________________ SCORE

OBJECTIVE 20 **Complete a purchase order.**

INTRODUCTION

Most companies order merchandise from vendors through the purchase order process. This process can vary greatly depending upon the size of the company:

- Small companies may simply write letters to their vendors to order the merchandise they need.
- Mid-size and large companies may use either a combination of requisitions and purchase orders or purchase orders only...depending upon the need for control over the "buying function."

NOTE: Since the procedures for preparing requisitions and purchase orders are similar, we are limiting this study to the preparation of purchase orders.

Part I

Assume you are the Horticulture Department Manager for S & F Department Store. You have just received a new procedure from the "Home Office" entitled, *Preparing A Purchase Order.*

Study this new procedure and then go to Part II.

S & F DEPARTMENT STORE OPERATIONS MANUAL

Preparing A Purchase Order

FORM USED

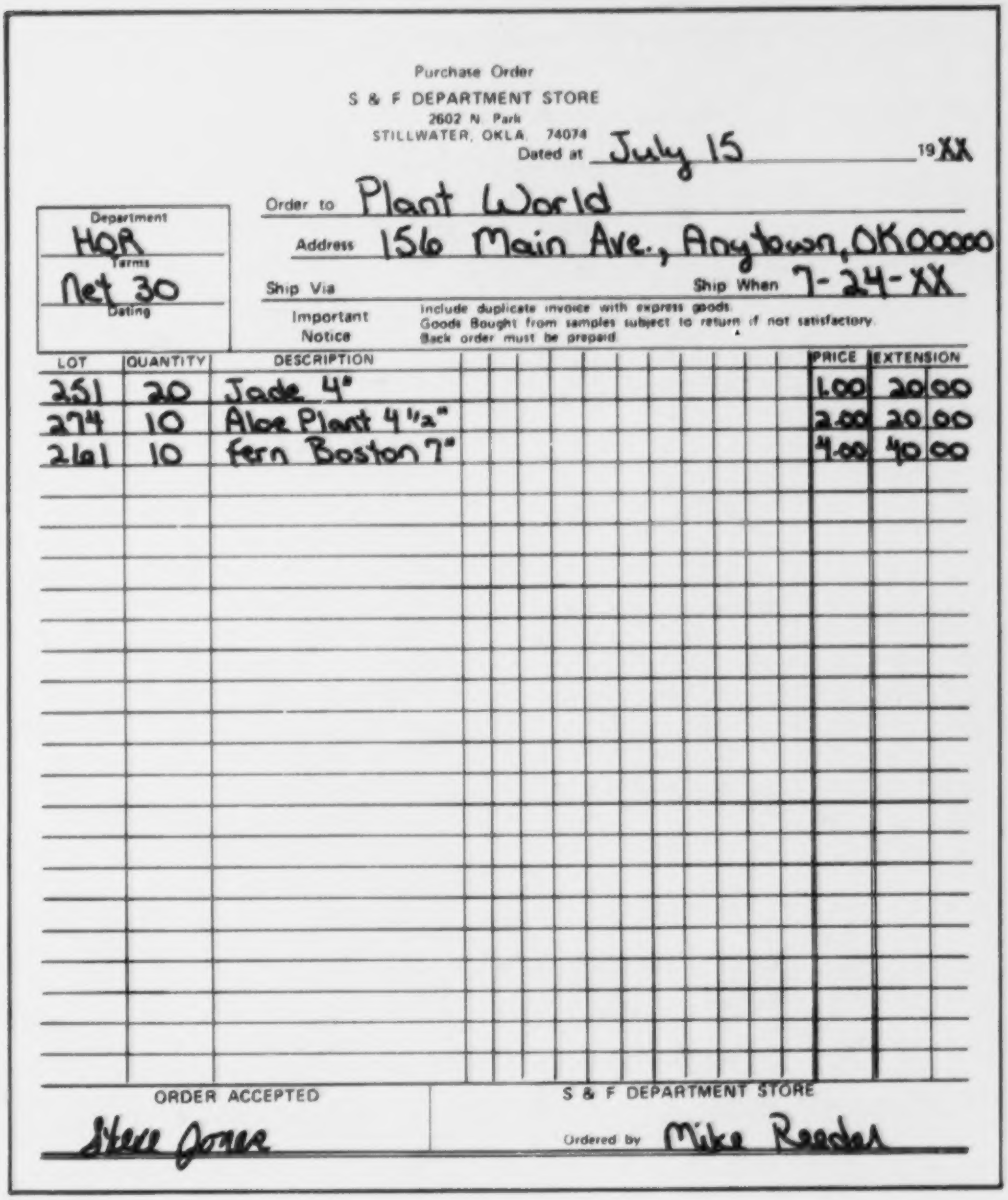
Below is an example of a completed purchase order. Typically they are three part forms:

Original copy goes to the vendor.

Second copy goes to the store's central office/accounts payable.

Third copy goes in the store's Open Order File.

Purchase Order



Purchase Order
S & F DEPARTMENT STORE
2602 N. Park
STILLWATER, OKLA. 74074

Dated at July 15 19XX

Order to Plant World

Address 156 Main Ave., Anytown, OK 00000

Ship Via

Ship When 7-24-XX

Department HOR

Terms Net 30

Dating

Important Notice
Include duplicate invoice with express goods.
Goods Bought from samples subject to return if not satisfactory.
Back order must be prepaid.

LOT	QUANTITY	DESCRIPTION	PRICE	EXTENSION	
251	20	Jade 4"	1.00	20	00
274	10	Aloe Plant 4½"	2.00	20	00
261	10	Fern Boston 7"	4.00	40	00

ORDER ACCEPTED
Steve Jones

S & F DEPARTMENT STORE
Ordered by Mike Reeder

706

PROCEDURE

Part I

INFORMATION AND SOURCE

1. Store address or store stamp

   Purchase Order Number and today's date

2. Department code or name, ie. Lawn & Garden, Hardware, Horticulture, etc.
3. Vendor's name and address.
4. Date you want the merchandise shipped.
5. Enter the date the order is cancelled if it hasn't been shipped.
6. Enter shipping information from your vendor's listing.
7. Fill in the terms, from your vendor's listing.
8. Stock number for the item.
9. Item description or name.
10. List the number of items in each case, when ordering in case quantities.
11. Enter the weight per case, when weight is a consideration in determining minimum shipments.
12. Fill in the quantity desired.
13. Write in the unit designation for the quantity ordered, ie. "each" or "only" for single items, dozens, cases, etc.

    NOTE: The vendor listing will designate which one you are to use.

14. Fill in the cost per unit.
15. Write in the unit designation.
16. Post the cost extension on the "second" and "third" copies.
17. List the selling price for each item.
18. Get signature of person authorized to sign purchase orders.
19. Remove the perforated strip listing the retail prices from the "original" before mailing.

DIRECTIONS

Part II

You are running low on some of the basic items in your department. They are available from the Nurserymen's Exchange, 4044 Scott Street, San Francisco, CA 94103.

You are to reorder the following items:

30, Lot #247, Aloe plant 4 1/4 in., Cost 1.85 each
120, Lot #240, Foliage asst. 4 in., Cost 1.03 each
30, Lot #244, Jade, 4 in., Cost 1.03 each
30, Lot #240, Fern asst. 4 in., Cost 1.25 each
12, Lot #260, Croton 6 in., Cost 3.65 each
30, Lot #265, Poles asst. 6 in., Cost 4.48 each

Complete the purchase order.

Use the information listed above

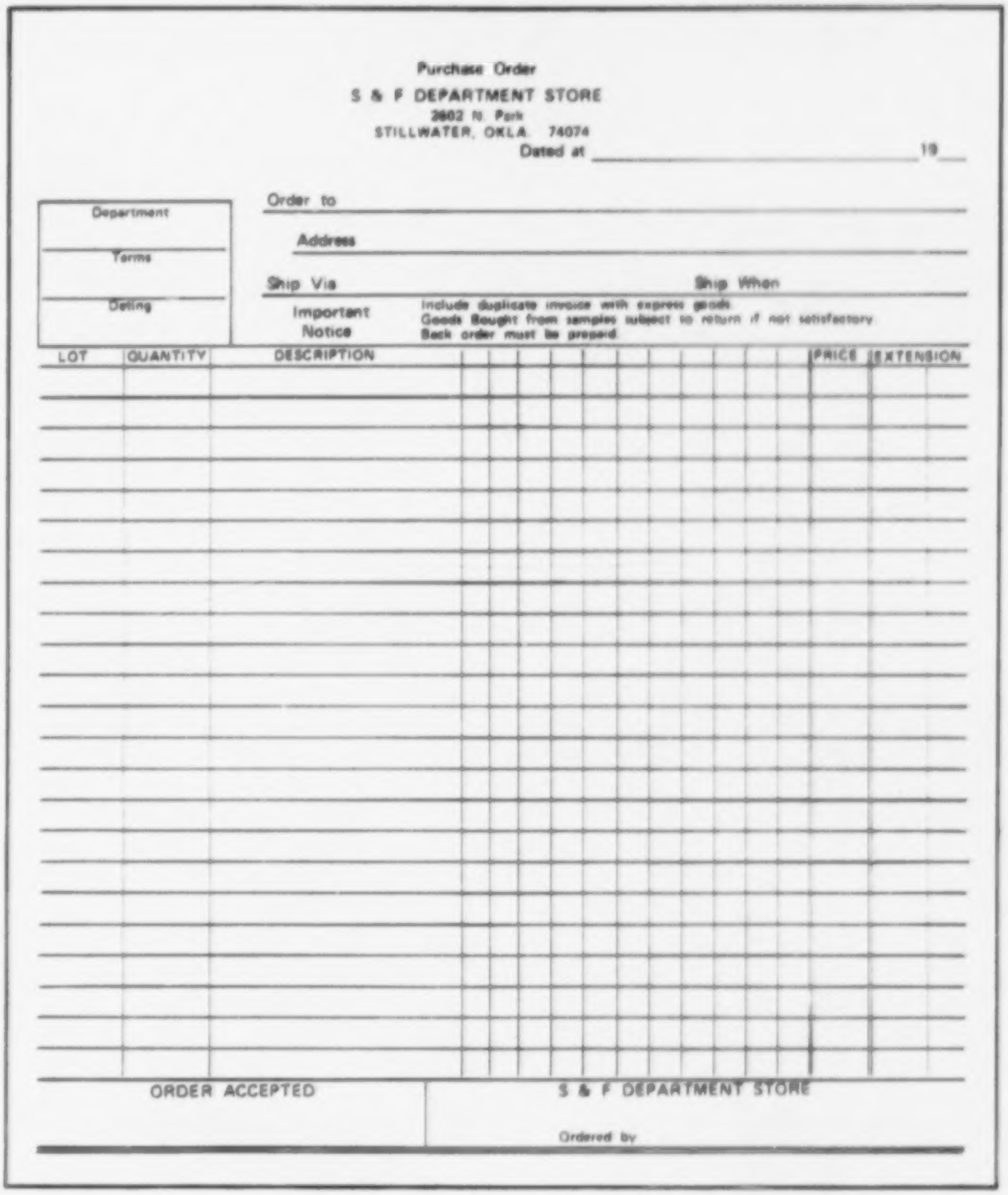
Print or type information

Use current date

Supply other information as necessary

708

Purchase Order



Purchase Order
S & F DEPARTMENT STORE
2602 N. Park
STILLWATER, OKLA. 74074

Dated at ______________________ 19___

Department

Terms

Dating

Order to ______________________

Address ______________________

Ship Via ______________ Ship When ______________

Important Notice
Include duplicate invoice with express goods.
Goods Bought from samples subject to return if not satisfactory.
Back order must be prepaid.

LOT	QUANTITY	DESCRIPTION	PRICE	EXTENSION

ORDER ACCEPTED

S & F DEPARTMENT STORE

Ordered by

709

ASSIGNMENT SHEET 1

1. a. $130.00
   b. $ 4.69
   c. $ 2.93
   d. $ 2.24
2. a. $ 5.25
   b. $11.96
3. a. $4.21
   b. $8.00
4. a. 40%
   b. 43.5%
5. a. 100%
   b. 139%
6. a. $0.31
   b. $2.50

ASSIGNMENT SHEET 2

INVENTORY WORKSHEET

Department Small Appliances

Date Today's date

Line #	Description	Quan.	Retail Price	Markup	Retail Extension	Cost Extension	Markup
1	3-way hairsetter HCD4	7 ea.	$27.98	40%	$195.86	$117.52	($78.34)
2	Deluxe hairsetter 1546	11 ea.	25.95	50%	285.45	142.72½	(142.72½)
3	Minisetter HCD8	9 ea.	23.95	40%	215.55	129.33	(86.22)
4	Custom Care Setter KF20	10 ea.	39.99	40%	399.90	239.94	(159.96)
5	Prodryer 1400	14 ea.	24.98	40%	349.72	209.83	(139.89)
6	Superdry 5124	15 ea.	39.95	50%	599.25	299.62½	(299.62½)
7	Dryer Current MD42	12 ea.	23.99	40%	287.88	172.73	(115.15)
8	Dry One MRD 38	10 ea.	19.99	50%	199.90	99.95	(99.95)
9	Dry Yer Hair DR69	13 ea.	23.69	50%	307.97	153.98½	(153.98½)
				TOTAL(S)	$2,841.48	$1,565.53½	$1,275.84½

INVENTORY WORKSHEET

Department Jewelry & Clocks Date Today's date

Line #	Description	Quan.	Unit	Cost	Extension
1	Anniversary Clock G610	6	each	$88.93	$533.58
2	400-day Anniversary Clock G824	4	each	82.90	331.60
3	Electronic Strike Mantel Clock G825	3	each	76.44	229.32
4	Waterbury Chime Mantel Clock E111	4	each	162.47	649.88
5	Triple Chain Mantel Clock F92	7	each	211.74	1,482.18
6	Quartz Boutique Alarm Clock G475	2	each	49.57	99.14
7	Quartz Oval Wall Clock F12	3	each	44.83	134.49
8	Rattan Decorator Clock G610	5	each	43.60	218.00
9	Mason Cuckoo Clock E211	6	each	37.95	227.70
			TOTAL		$3,905.89

ASSIGNMENT SHEET 3

1. $28.00; $12,500; $15,500

2. $13,500; $5,000; $8,500

3. $24,000; $2,250; $21,7500

ASSIGNMENT SHEET 4

1. a. April 25 (within 10 days from date of invoice, April 15)

   b. $ 300$300
   x .03- 9
   $9.00 $291

   c. May 15 (within 30 days after the date of invoice, April 15)

2. a. August 25 (10 days after date of invoice, August 15)

   b. $ 3000$3000
   x .02- 60
   $60.00$2940

3. $25.00 $25.00
   x .35 - 8.75
   $ 8.75 $16.25

4. a. July 25 (10 days after date of invoice, July 15)

   b. $ 2500$2500
   x .02- 50
   $50.00$2450

5. $6.00 $6.00
   x .40 -2.40
   $2.40 $3.60

6. a. April 10 (within 10 days after end of month of date of invoice, March 15)

   b. $ 150$150.00
   x .03- 4.50
   $4.50 $145.50

   c. April 30 (within 30 days after end of month of date of invoice, March 15)

ASSIGNMENT SHEET 5

NOTE: A suggested "Purchase Order Answer" sheet is provided on the next page.

- Each student should be expected to:
- Fill in the vendor address and terms information correctly
- List all of the items to be ordered correctly
- Extend the cost information correctly
- Prepare the form in a manner that is neat and legible
- Supply the shipping date, cancel date, F.O.B. terms, today's date, and signature

714

Purchase Order

S & F DEPARTMENT STORE

2802 N. Park
STILLWATER, OKLA. 74074

Dated at Today's Date 19XX

Order to Nurserymen's Exchange

Address 4044 Scott St, San francisco, CA 94103

Ship Via

Ship When

Department HOR

Terms Net 15

Dating

Important Notice
Include duplicate invoice with express goods.
Goods Bought from samples subject to return if not satisfactory.
Back order must be prepaid.

LOT	QUANTITY	DESCRIPTION	PRICE	EXTENSION	
247	30	Aloe Plant 4¼"	1.85	55	50
240	120	Foliage Asst 4"	1.03	123	60
244	30	Jade 4"	1.03	30	90
240	30	fern Asst. 4"	1.25	37	50
260	12	Croton 6"	3.65	43	80
265	30	Poles Asst. 6"	4.48	134	40

ORDER ACCEPTED

S & F DEPARTMENT STORE

Ordered by

WRITTEN TEST

MERCHANDISING

IX

NAME ______________________________ SCORE ________

OBJECTIVE 1

Match terms associated with merchandise systems and controls to their correct definitions. Write the correct letters in the blanks.

____ 1. An index of the velocity into and out of a store with which merchandise moves or department.

____ 2. Merchandise that the customer expects to be in stock at all times and that is generally reorderable over a relatively extended period of time

____ 3. A bookkeeping system, often computerized, that provides information by classification of all merchandise in the store

____ 4. The difference between cost and retail, expressed either as a percentage of cost or, commonly, as a percentage of retail

____ 5. A method of accounting in which all percentages are relative to the retail price instead of the cost price

____ 6. An inventory determined by actual count, usually compiled in dollars as well as units

____ 7. Those calling for the billed amount of the invoice, with no cash discount allowed

____ 8. The actual cost or market value, whichever is lower, of the inventory on hand at any time

a. Markup percentage
b. Distributor
c. Delivery
d. Retail method of accounting
e. C.O.D.
f. Transportation
g. Cost method of inventory
h. Physical inventory
i. Retail price
j. Breakdown point
k. Lead time
l. Net terms
m. Credit method of inventory
n. Invoice
o. Gross sales
p. Cost of goods purchased
q. Wholesaler
r. F.O.B.
s. Cost inventory

____9. The purchase price of products bought plus the cost of transportation or delivery to the point where they will be used; does not typically include cash discounts

___10. Wholesale middleman, especially in lines where selection or exclusive agency distribution is common at the wholesale level and the manufacturer expects strong promotional support

___11. Discount counted from the end of the month rather than the date of invoice

___12. A part of an order that the vendor has not filled on time and that the vendor intends to ship as soon as the goods in question are available

___13. The sales volume point at which revenues and costs are equal; a combination of sales and costs which yields a no-profit, no-loss operation

___14. The amount of retail stock that is shown to be on hand in a perpetual inventory system

___15. Collect on delivery; the buyer must make payment for purchase at time of delivery of goods

___16. The determination of the cost of inventory on hand by marking the actual cost on each price ticket in code and computing inventory in the accounting period

___17. Cost of merchandise less discounts, but including transportation

___18. Total sales before deducting returns and allowances, but after subtracting corrections and trade discounts, sales taxes and excise taxes based on sales; and, sometimes, cash discounts on sales

t. Cost of goods sold

u. End of year dating

v. Inventory

w. Cash discount

x. Book inventory

y. Keystone markup

z. Back order

aa. Stock turnover

bb. Markdown

cc. End of month dating

dd. Markdown

ee. Perpetual inventory

ff. Markup

gg. List price

hh. Staple merchandise

___ 19. A printed price, as in a catalog, subject to trade and cash discounts

___ 20. An itemized statement from the vendor showing charges for merchandise; it should agree with your purchase order

___ 21. A reduction in the retail price of merchandise primarily taken for clearance of broken assortments and sizes, prior stock, for special sales events, and to meet competition

___ 22. The difference between the cost price as billed (before deductions for cash discounts) and the retail price at which merchandise is sold

___ 23. Upward revision of initial markon, resulting in a higher than original retail sellingprice

___ 24. A markup on merchandise of 100 percent of cost or 50 percent of the retail or selling price

___ 25. Any agreed-upon destination to which transportation charges are paid by the vendor while title passes to the purchaser

___ 26. Value of merchandise on hand at cost or retail; "perpetual inventory" makes day-to-day changes in inventory

___ 27. The length of time that elapses from the cut-off at a review point (count day or last day of sales) until ordered merchandise is available for selling at the location for which it has been ordered

OBJECTIVE 2

Match the sources of merchandise to their correct definitions. Place the correct letters in the blanks.

____1. A type of wholesaler who department in a retail sets up and services a store on a contract basis

____2. Sell their products directly to the retailer

____3. Buy goods in large quantities and redistributes them in small quantities

____4. A type of wholesaler who is in the business of importing merchandise from foreign countries

____5. These resources are primarily middlemen, who seldom warehouse or hold title to merchandise, but simply sees that merchandise is moved through trade channels.

a. Wholesalers

b. Exhibitors

c. Manufacturers

d. Rack jobber

e. Jobbers, Agents and Brokers

f. Stockbrokers

g. Importers

h. Merchandisers

OBJECTIVE 3

Select from a list ways to identify suppliers. Write an "X" in the blank before each correct answer.

____ 1. Work with disc jockeys

____ 2. Ask business associates for suggestions

____ 3. Read trade journals

____ 4. Read yellow pages and other business directories

____ 5. Attend major concerts

____ 6. Ask manufacturer's representatives to suggest alternate sources of merchandise

____ 7. Visit trade exhibits and conferences

____ 8. Work with rack jobbers

OBJECTIVE 4

Arrange in order the steps to take when receiving merchandise. Write a "1" before the first step, a "2" before the second step, and so on.

___ Place the damaged merchandise and delivery cartons together in case there is a question regarding the claim by the carrier.

___ After unloading, count boxes and compare with freight bill for indicated quantities received.

___ Record shipment in receiving book.

___ Verify with the freight bill that the shipment is addressed to your store.

___ Help the delivery person unload and stack all boxes in receiving area.

___ Manager and delivery person sign all copies of the freight bill.

___ Inspect freight bill to ensure all information is correct.

___ Have delivery person note any shortages or damages on all copies of the freight bill and bill of lading.

OBJECTIVE 5

State guidelines for completing receiving records. List any four of the guidelines in the space provided.

OBJECTIVE 6

State reasons for filing claims.

OBJECTIVE 7

Arrange in order the steps to take when checking in merchandise. Write "1" before the first step, "2" before the second step, and so on.

____Attach the freight bill and/or packing slip to the Purchase Order.

____Mark the merchandise in the appropriate manner.

____Verify the quantities of each item received to the quantities shown on the Purchase Order.

____Sign and date the Purchase Order and return it to your store's office for processing.

____Calculate the selling price for each item.

____Place the merchandise on display in the proper location.

OBJECTIVE 8

Select from a list guidelines used when pricing merchandise. Write an "X" in the blank before the correct answers.

____ 1. Exercise care in setting the number of price points within a given line.

____ 2. Ignore your competitors and they will leave you alone.

____ 3. Select price lines that properly reflect your store's overall image.

____ 4. Merchandise should be marked up on an individual item basis.

____ 5. Devote sufficient attention to pricing and price adjustments.

OBJECTIVE 9

Match markup theories to the correct explanation. Write the correct letters in the blanks.

____ 1. A trade term that means "double the price;" sometimes referred to as the "lazy" markup.

____ 2. Those who recommend this approach state that you should always get the highest possible price for any item as long as you don't drive the customer away.

____ 3. Some retailers set pricing on the basis of achieving volume sales at different price levels. The lower the price, the greater the market penetration.

____ 4. This theory has overtones of the "What the Market Will Bear Theory." It differs in that retailers who are adherents of this theory desire immediate reaction from the market and are willing to drop back to a lower price to get mass distribution.

____ 5. Particular markup percentages are practiced in certain trade areas. Those who follow this formula simply want to be competitive with others in the trade and not bothered with individual item analysis.

a. Trade acceptance principle

b. John Maynard Keynes theory

c. Advancing recessions theory

d. Keystone principle

e. Price Market penetration theory

f. What the Market Will Bear theory

g. The High Start/ Quick Dropback theory

OBJECTIVE 10

Arrange in order the steps to determine the retail price. Write a "1" before the first step, a "2" before the second, and so on.

____ a. Determine the cost of a single item by dividing the number of items received into the landed cost.

____ b. Subtract the percentage of markup you want from 100 percent. This represents the selling price percentage.

____ c. To determine the selling price (dollars), divide the "selling price percentage" (answer in previous step) into the actual cost of each item.

OBJECTIVE 11

Distinguish between characteristics of the types of inventory systems. Write an "M" for manual inventory systems and an "E" for electronic inventory systems in the blanks.

____ 1. Separate records are maintained for each item in inventory.

____ 2. Inventory control cards are generally maintained as a data base.

____ 3. Computer system may be located within the business or may be a leased service.

____ 4. Minimum system for inventory control.

____ 5. Generally used when a large number of items are maintained in inventory.

OBJECTIVE 12

Read cost codes. Use the following word code devices to decode the cost in each problem below.

Part I

Word Code	Coded Cost Amount	Decode
1 2 3 4 5 6 7 8 9 0 F O U R P L A Y E D	EPAURL	EX. $9573.46
REPUBLICAN	PBIE	a. __________
REPUBLICAN	CNUBR	b. __________
MONEY TALKS	EKMNT	c. __________
MONEY TALKS	YYLS	d. __________
COST MARKED	OCEK	e. __________

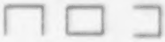
Part II

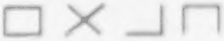
Assume your store uses a tic-tac-toe grid cost system like the one shown below.

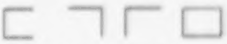
1	2	3
4	5	6
7	8	9

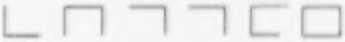
and "x" = 0

Use the tic-tac-toe grid to decode the following cost codes.

_________ a. 

_________ b. 

_________ c. 

_________ d. 

OBJECTIVE 13

Select from a list guidelines for taking a physical inventory. Write an "X" before each correct answer.

____ 1. Stress the importance of being on time for work.

____ 2. You are to concentrate totally on counting—and alone to minimize mistakes.

____ 3. Inventories are a good time to socialize and get to know the other associates in the store.

____ 4. If you start making frequent errors, stop counting.

____ 5. Frequently spot check counts for accuracy.

____ 6. Put a count ticket on each group of merchandise working left to right and top to bottom.

____ 7. Make separate tickets for each color, flavor, size of like items, even when displayed side by side.

____ 8. Spot check counts for accuracy before pulling the inventory slips.

OBJECTIVE 14

Select from a list statements about inventory control guidelines. Write an "X" before each correct answer.

____ 1. Invest in inventory according to a sound merchandise plan.

____ 2. Maintain accurate, up-to-date records.

____ 3. Use records as a data base for decision making.

____ 4. Purchase the proper assortment of goods in quantities that will maintain inventory levels consistent with customer demand.

____ 5. Invest on impulse to keep inventory interesting for customers.

____ 6. Provide safety stocks to prevent stockouts caused by unexpected demand or delays in shipments.

____ 7. As sales in one classification increase, build up your inventory; as sales in a classification decrease, slow down your reorders.

____ 8. As sales in one classification decrease, build up your inventory; as sales in a classification increase, slow down your reorders.

____ 9. Take prompt action to correct inventory imbalances so that capital created may be invested in merchandise with greater market potential.

OBJECTIVE 15 **Match terms associated with discounts and payments due to the correct definitions.** Write the correct letters in the blanks.

____ 1. Discount period begins at the end of the month is dated in which the invoice

____ 2. Allowance for advertising the merchandise

____ 3. Special deduction from the list price stated in the catalog

____ 4. Deduction given if full payment is made early

____ 5. Special discounts offered to those who place orders well in advance of the normal buying season

____ 6. Two or more discounts from the list price

____ 7. Discount period begins the day the merchandise is received by the store

____ 8. Additional days, designated by an "X", given to the buyer before payment is due

____ 9. Merchandise remains the property of the seller and is paid for after it has been sold

___ 10. Point in the transfer of merchandise where the person buying the merchandise begins paying the shipping costs

___ 11. Payment of merchandise computed from a date after the merchandise is shipped

a. Seasonal discount

b. Year-end discount

c. Trade discount

d. Cash discount

e. Promotional discount

f. Chain (series) discount

g. E.O.M. (end of month)

h. Credit discount

i. R.O.G. (receipt of goods)

j. E.O.Y. (end of year)

k. F.O.B. (free on board)

l. Extra dating

m. Advance dating (post dating)

n. Consignment

NOTICE The following assignment sheets are not part of the written test. If these activities have not been completed, check with your instructor.

OBJECTIVE 16 **Apply formulas used in pricing merchandise.**

SCORE ________

OBJECTIVE 17	**Calculate inventory extensions.**	SCORE ________
OBJECTIVE 18	**Compute open-to-buy.**	SCORE ________
OBJECTIVE 19	**Calculate discounts and payments due.**	SCORE ________
OBJECTIVE 20	**Complete a purchase order.**	SCORE ________

MERCHANDISING

OBJECTIVE 1

1. aa
2. hh
3. ee
4. a
5. d
6. h
7. l
8. s
9. p
10. b
11. cc
12. z
13. j
14. x
15. e
16. g
17. t
18. o
19. gg
20. n
21. bb
22. dd
23. ff
24. y
25. r
26. v
27. k

OBJECTIVE 2

1. d
2. c
3. a
4. g
5. e

OBJECTIVE 3

2, 3, 4, 6, 7, 8

OBJECTIVE 4

__6__ Place the damaged merchandise and delivery cartons together in case there is a question regarding the claim be the carrier.

__3__ After unloading, count boxes and compare with freight bill for indicated quantities received.

__8__ Record shipment in receiving book.

__1__ Verify with the freight bill that the shipment is addressed to your store.

__2__ Help the delivery person unload and stack all boxes in receiving area.

__7__ Manager and delivery person sign all copies of the freight bill.

__4__ Inspect freight bill to ensure all information is correct.

__5__ Have delivery person note any shortages or damages on all copies of the freight bill and bill of lading.

OBJECTIVE 5

The list should have any four of the following guidelines:

- Keep the Receiving Book where merchandise is received.
- Fill in information on receipt of merchandise, fixtures or supplies.
- Use pages in sequential order.
- Void any ruined pages.
- Fill in the "Beginning Date" at the top of the page, when you start a new page.
- Record merchandise by individual vendor name.

OBJECTIVE 6

The list of reasons should include:

- Damaged merchandise—visible and concealed
- Shortages—visible shortages (cartons short) and inner carton shortages or "packing errors"

OBJECTIVE 7

5 Attach the freight bill and/or packing slip to the Purchase Order.

3 Mark the merchandise in the appropriate manner.

1 Verify the quantities of each item received to the quantities shown on the Purchase order.

6 Sign and date the Purchase Order and return it to your store's office for processing.

2 Calculate the selling price for each item.

4 Place the merchandise on display in proper location.

OBJECTIVE 8

1, 3, 4, 5

OBJECTIVE 9

1. d
2. f
3. e
4. g
5. a

OBJECTIVE 10

a. 1
b. 2
c. 3

OBJECTIVE 11

1. M
2. M
3. E
4. M
5. E

OBJECTIVE 12

Part I

a. $35.72

b. $804.51

c. $491.36

d. $55.80

e. $21.98

Part II

a. $82.49

b. $50.18

c. $67.92

d. $3877.35

OBJECTIVE 13 2, 4, 5, 6, 7, 8

OBJECTIVE 14 1, 2, 3, 4, 6, 7, 9

OBJECTIVE 15

1. g
2. e
3. c
4. d
5. a
6. f
7. i
8. l
9. n
10. k
11. m

OBJECTIVE 16 Refer to answers to Assignment Sheet 1.

OBJECTIVE 17 Refer to answers to Assignment Sheet 2.

OBJECTIVE 18 Refer to answers to Assignment Sheet 3.

OBJECTIVE 19 Refer to answers to Assignment Sheet 4.

OBJECTIVE 20 Refer to answers to Assignment Sheet 5.

OBJECTIVE SHEET

USING DISPLAY TECHNIQUES

X

INTRODUCTION

Visual merchandising includes everything you see as you approach an agribusiness and after you enter it. This includes signing, design, layout, fixture arrangements, floors, lighting, and *most important of all* the merchandise presentation or display.

Since consumers are more sophisticated, and have more choices of where to shop than ever before, neat attractive displays are essential in today's competitive environment.

UNIT OBJECTIVE

After completing this unit, the student should be able to design and create a display using the proper techniques of arrangement, color and lighting and guidelines for creating showcards. The student will demonstrate this competency by completing the assignment sheet, job sheet and written test with a minimum of 85 percent accuracy.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to

1. Match terms associated with displays to their correct definitions.
2. Select from a list the purposes of displays.
3. State advantages of displays.
4. Describe types of interior displays.
5. Describe outside and window displays.
6. List the tasks that must be performed daily to ensure the layouts of basic merchandise are maintained and ready to "sell."
7. Select from a list guidelines for setting up interior displays.
8. Match elements of good display design to their correct descriptions.
9. Match basic design principles to their correct descriptions.
10. Distinguish between formal and informal balance in a display.
11. Identify basic display arrangements.
12. List factors to consider when using color in displays.

13. Select from a list true statements about lighting techniques used in displays.

14. List steps in creating a display.

15. Name common display materials.

16. State purposes of show cards.

17. Identify parts of a show card.

18. List factors to consider when creating show cards.

19. List ways to maintain a display.

20. Plan a display. (Assignment Sheet 1)

21. Construct a display, including show card. (Job Sheet 1)

USING DISPLAY TECHNIQUES

PREPARATION

- Obtain materials to supplement unit.

  NOTE: See Suggested Resources.

- Review instructional outline for this unit. Modify time frames to suit class needs and plan activities for each class period.

- Study the specific objectives to determine those you will cover in your presentation. Decide also which objectives should be taught to which students.

- Determine scope and sequence of objectives that you add. Design and develop support materials, including evaluation techniques, for additional objectives.

- Determine how you will schedule time for students to demonstrate competence in the required procedures.

- Make arrangements for guest speakers. Supply speakers with specific objectives and other appropriate sections of the unit.

- Arrange for the class to visit businesses and observe display techniques.

- Prepare classroom.
  - Put up posters dealing with display techniques or examples of good displays.
  - Have articles, brochures, or other literature dealing with display and design techniques.
  - Provide magazines for students to find examples for various display types, arrangements, and design principles discussed in this unit.

DELIVERY

Objective 1

- Discuss unit and specific objectives. Use Teacher Supplement 1.

- Survey class to find out if they view display as an important part of the sales and service business.

734

- Survey class to find out if they view display as an important part of the sales and service business.

- Invite a display representative or manager/owner from a local agribusiness to discuss the importance of display techniques with the class. Have speaker discuss job opportunities in display and other aspects of display work.

- Arrange for the class to take a field trip to view displays in various businesses.

- Discuss terms and definitions. If possible, provide students with examples to illustrate terms when possible.

Objective 2

- Discuss purposes of displays. Emphasize that the type and quality of displays reflect the image of the business and that they should always reflect the type of image the store wants. Mention that displays should tie in with the advertisements and sales techniques of the business.

- Have students complete Activity Sheet 1.

Objective 3

- Discuss advantages of displays. Mention to students that many displays can be made with little expense or effort.

Objective 4

- Discuss types of interior displays. Use Teacher Supplement 2.

- Visit local businesses and observe interior displays.

Objective 5

- Discuss outside and window displays. Use Teacher Supplement 2.

- Visit local businesses and observe outside and window displays.

Objective 6

- Use Teacher Supplement 3 to lead the discussion associated with this objective.

- Point out to the students that these are the types of tasks they will be assigned when they are "just getting started." Then

Then as they learn more about their employer's business they will have opportunities to do the "creative" displays discussed later in this unit.

Objective 7

- Review guidelines for setting up interior displays with class. Have students go into a store and observe how merchandise is arranged and displayed throughout the store. Point out that merchandise is often arranged for a reason, even though displays may be very simple. For example, most stores place high demand items and/or high traffic departments at the back of the store so that customers must pass other items on their way through the store, and thus are more likely to purchase other items also. Likewise, candy, gum, small toys, and other items are often placed at check-out counters so that people will become interested in them as they are waiting in line to check out.

Objective 8

- Discuss display design elements. Provide examples from photographs, magazine ads, or other sources of effective and ineffective use of display design elements.

Objective 9

- Discuss basic design principles of display and show students examples of each.

Objective 10

- Explain the difference between formal and informal balance in a display. Emphasize to students that with formal balance, the left half of a display is a "mirror image" of the right half. With informal balance, elements of different size, shape, or other characteristics are grouped together so that the total display appears balanced to the viewer. If possible, have examples of both types of displays in class.

Objective 11

- Discuss basic display arrangements.

Objective 12

- Discuss ways color can affect a display. Use Supplement 1 (color wheel). Explain that, according to the position on the wheel, colors may be developed into a color scheme. For example, five colors ranging from red to pale pink would create a color scheme. By drawing a triangle within the wheel, a triadic color scheme may be created. The three colors at the triangle points will work together, or a line straight across from one color to another will create a complementary scheme.

- Have students discuss the various impressions that certain colors may give them. Point out certain types of items and have them discuss how certain colors may enhance or detract from displays of various merchandise.

Objective 13

- Discuss lighting techniques used in displays. Emphasize that lighting should not distort the true color of merchandise to be displayed.

Objective 14

- Discuss basic steps in creating a display. Point out that an employee may be required to plan displays for the entire year and prepare a budget for each.

- Have students complete Activity Sheet 2.

- Have students complete Activity Sheet 3.

Objective 15

- Discuss common display materials with class. Have class think of unusual items which could be used in displays.

Objectives 16 through 18

- Discuss reasons show cards may be used in a display. Point out the parts of a show card.

- Discuss factors in creating show cards. Use Supplement 2.

- Have students go to various stores and see if show cards are used, and why or why not.

Objective 19

- Discuss ways to maintain a display. Emphasize that all displays must be kept clean and should be changed often. In this way, passersby will get accustomed to looking at each new display and are more likely to become interested in various items and make purchases.

APPLICATION

Objective 20

- Use Assignment Sheet 1 to give students practice in planning a display.

Objective 21

- Use Job Sheet 1 to have students demonstrate competence in constructing a display.
- Have a "best display" contest when having class complete Job Sheet 1 and have students critique each other's displays. Develop a rating sheet or checklist for students to use.

EVALUATION

Practical Test

- Explain to students that they will be asked to demonstrate procedures on the job sheets to complete the practical test.
- Describe the rating scale used on the practical test.
- Give practical test.

Written Test

- Reteach and retest as necessary.
- Explain to students that they will be asked to demonstrate on the written test actions listed in the specific objectives.
- Give written test.

  NOTE: The written test may be given in sections if desir'ed.

- Evaluate students on assignment sheet activity if not previously done.
- Reteach and retest as necessary.
- Complete appropriate section of competency profiles.
- Review individual and group performance in order to evaluate teaching methods. Adjust scope, sequence, or instructional approaches for additional lessons as required.

SUGGESTED RESOURCES

Publications

- McGuire, James. E., *Advertising and Display in Agribusiness*, McGraw-Hill Book Co., New York, 1979.
- Mills, Kenneth, and Judith Paul, *Applied Visual Merchandising*, Prentice-Hall, Englewood Cliffs, New Jersey, 1982.
- Obtain catalogs from display fixture companies or get information from local businesses concerning the cost of various props.

  NOTE: Contact Central Sales Promotions, Inc., P.O. Box 53444, Oklahoma City, OK, 73152, (405) 525-2335 or 1-800-654-8435 for a copy of their latest catalog. CSPI is one of the nation's leading point-of-sale printing and signing companies.

UNIT REFERENCES

- *Distributive Education II*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1976.
- *Employment in Agribusiness*, Jane Huston, ed., Mid-America Vocational Curriculum Consortium, Stillwater, Oklahoma, 1984.
- Ernest, John W., and Richard D. Ashmun, *Selling Principles and Practices*, 5th ed., Gregg Division, McGraw-Hill Inc., New York, 1980.
- *IDECC Marketing Education Lap OK 4 Display*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1989.
- Wingate, John W., and Carroll A. Nolan, *Fundamentals of Selling*, 10th ed., South-Western Publishing Co., Cincinnati, 1976.

USING DISPLAY TECHNIQUES

Visual merchandising includes everything you see as you approach a store and after you enter it. This includes signing, design, layout, fixture arrangements, floors, lighting and, most important of all, the merchandise presentation or displays.

More than anything else, visual merchandising is concerned with "show-casing" merchandise.

The purpose of this unit is to:

- Guide you through a simple way of evaluating the appearance of an agribusiness.
- Provide you with some basic principles you can use to enhance the effectiveness of displays.

Our approach will be to:

- Take a look at some typical/local agribusinesses as seen through the "eyes of a customer."
- Study some simple display and signing techniques that could enhance the business's image.

NOTE: You can use the following commentary to make the assignment associated with Activity Sheet 1.

Looking Through the Eyes of a Customer

Every customer entering your store will see your store front, windows, doors and cash register area. This initial impact is an important part of your store's overall "visual" presentation.

Now think like a customer. Does your store look like a clean pleasant place to shop?

- Let's Take a Look

For a few moments, step out of your role as an employee/manager/owner and take a look at the store as if you were a customer coming in for the first time. Start out in the parking lot and walk toward the store. What do you see? Do you like it?

By the time your customers come through the door, they will have already formed an impression of what they might expect inside.

Here are some areas that can make a big difference.

- Clean windows and doors.
- Clean sidewalks—free of trash and litter.
- Store hours posted.
- If a sale is going on, does the store have the feel of an "event?"
- Uncluttered, neat and informative window banners and/or window displays.

• Look Around Inside

Open the doors and walk inside. What do you see? Do you like what you see? Once your customers enter the store, there are several important things you want them to see:

- A clean, uncluttered main entry/aisle; shopping baskets readily available.
- The current ad on display in the ad rack.
- Clear traffic aisles so they can easily move to other areas of the store.

• Ask Yourself

Now that you have taken a good look at your store:

- How do you feel about its overall appearance?
- Does it look like a clean, pleasant place to shop?
- What are the things that need immediate attention?
- What are those things you could make a part of your daily routine that would enhance your store's positive image in the eyes of your customers?

When discussing display types, explain variations within each:

Common *interior* displays are open, island, and end. In an open display, merchandise is placed on counters, tables, racks, etc. so that the customer can view and handle the merchandise. With an end display, merchandise is grouped at the ends of aisles. In an island display, merchandise is also on counters, racks, etc. but is separated from other merchandise like an "island." It may be in the center of the store.

Visit local businesses and observe interior displays.

Point out that there are other types of interior displays: A *dump* display is simply merchandise such as candy bars, which are dumped into a bin such as those seen at check-out counters. A *closed interior display* may feature expensive items such as jewelry, or fragile items which are displayed in showcases, etc.

Emphasize that all interior displays are designed to attract the customer's attention and to encourage impulse buying.

Discuss point-of-purchase displays and outside displays. Have students discuss why outside displays may be more important for certain businesses, such as equipment dealerships. Discuss attention-getting gimmicks such as flags, banners, unusual signs, etc. that are used with outside displays.

Window displays are either closed, semi-closed, or open. In a closed window display, the display window is completely separated from the rest of the store by a panel or other type background. In a semi-closed window display, the background is separated by half of a partition so that customers can also see into the store. In an open window display, the background is open and customers can see into the store (so the entire store is actually on display).

CARING FOR YOUR "SILENT SALESPERSON"

Another important aspect of the visual presentation in your store is that of the displays of basic merchandise. These displays are designed to create desire, to trigger impulse buying and to encourage "self selection."

A good basic merchandise display is a powerful "silent salesperson." It attracts customers, holds their attention and accomplishes all or at least some of the selling necessary to cause customers to buy.

In order for your "silent salesperson" to do its job properly, it has to be cared for. The process is quite simple:

- Restock
- Straighten
- "Face" your counters, shelves and racks

  NOTE: "Facing" is the process of moving merchandise to the front edge of the shelf or "pegboard" hook, with the labels properly facing toward the customer.

Being a competent sales associate will require being constantly aware of the appearance of counters, shelves, racks, etc., and when necessary, taking the appropriate action to ensure they are ready at all times to sell for you.

BASIC ACADEMIC SKILLS

The following table identifies the basic academic skills that are reinforced in this unit of instruction. These basic academic skills were identified using *The Basic/Essential Skills Taxonomy*, 2nd ed., and verified during the validation process.

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 1	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 2	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 3	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 4	Free Enterprise 110	Describes/ Explains	Merchandising	
OBJECTIVE 5	Free Enterprise 110	Describes/ Explains	Merchandising	
OBJECTIVE 6	Free Enterprise 110	Describes/ Explains	Merchandising	
OBJECTIVE 7	Free Enterprise 110	Describes/ Explains	Merchandising	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 8	Science 474	Identifies	Matter properties	Physical
	Science 466	Identifies	Definitions	
OBJECTIVE 9	Language Arts 139	Comprehends	Information-written	Context
OBJECTIVE 10	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 11	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 12	Free Enterprise 110	Describes/ Explains	Merchandising	
OBJECTIVE 13	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 14	Free Enterprise 110	Describes/ Explains	Merchandising	
OBJECTIVE 15	Free Enterprise 110	Describes/ Explains	Merchandising	
OBJECTIVE 16	Free Enterprise 110	Describes/ Explains	Merchandising	
OBJECTIVE 17	Free Enterprise 110	Describes/ Explains	Merchandising	
OBJECTIVE 18	Free Enterprise 110	Describes/ Explains	Merchandising	

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 19	Free Enterprise 110	Describes/ Explains	Merchandising	
OBJECTIVE 20	Language Arts 035	Attends	Directions/ task	
	Language Arts 069	Composes/ Edits	Notes	
	Mathematics 229	Solves problems	Generate conclusions	Deductive reasoning
OBJECTIVE 21	Language Arts 035	Attends	Directions/ Task	
	Free Enterprise 110	Describes/ Explains	Merchandising	

INFORMATION SHEET | USING DISPLAY TECHNIQUES X

OBJECTIVE 1

Match terms associated with displays to their correct definitions.

- **Balance**—The arrangement of a display so that equal attention is given to all items and parts of the display

  NOTE: Balance may be either formal or informal.

- **Closed display**—Display where the merchandise is protected from handling, dust, danger, or theft
- **Color wheel**—Colors of the spectrum arranged in a circle and used to plan combinations of colors
- **Copy**—Words and printed material on a show card
- **Display**—The art of communicating visually with potential customers in order to influence their decision to purchase a product; visual merchandising
- **Display (thumbnail) sketch**—The blueprint which shows what it will look like and what is needed to assemble the display

  NOTE: A sketch should indicate size, shape, and distances between all items.

- **Dominance**—Emphasis given to an idea or item of merchandise to attract the customer's attention
- **Open display**—Display used to show merchandise so that the customer may touch it
- **Prop**—Fixture used to build a display
- **Show cards**—Signs used in displays to give information about the featured merchandise
- **Theme**—Subject or topic of display

  EXAMPLES: FFA, Harvest time, Thanksgiving, State or county fair

- **Visual merchandising**—Impersonal selling through the use of displays

OBJECTIVE 2 **Select from a list the purposes of displays.** (Activity Sheet 1)

NOTE: It is important that displays, advertisements, and the personal selling message all tie together.

- To sell merchandise and ideas.
- To bring customers into the store.
- To make the store exciting to customers.
- To establish an image of the store and to enhance its competitive edge.
- To suggest combinations of merchandise and related items.
- To introduce new items and uses for products.
- To create a pleasant shopping environment.
- To remind customers of items they may have forgotten.
- To produce maximum sales and profits.

OBJECTIVE 3 **State advantages of displays.**

- Involve real merchandise that can be examined by customers.
- Can be relatively inexpensive for a store to have.
- Can be changed easily to reflect trends.
- Can support advertising as part of a total promotional effort.
- Can help customers make a buying decision.

OBJECTIVE 4 **Describe types of interior displays.**

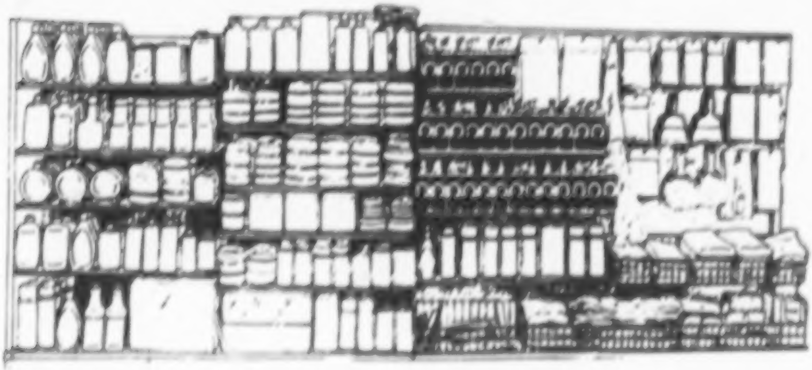
NOTE: Displays may be *promotional* (aimed at getting people's attention and creating interest to buy); or they may be *institutional* (aimed at promoting the feeling that the business cares about the community). Depending upon the nature of the institutional display, it may or may not tie in with the store's merchandise.

Some examples of institutional displays would be those in support of FFA or 4-H.

Interior displays—Displays inside the store; designed to attract customers, hold their attention and accomplish some or all of the "selling" necessary to cause customers to buy.

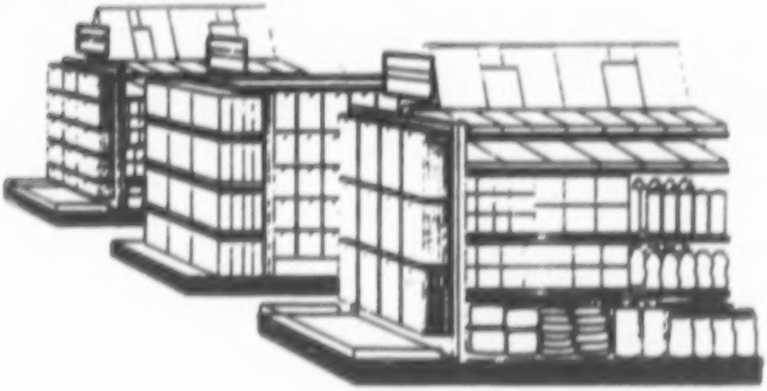
Some examples of interior displays are shown below:

- Side counter/gondola displays



  - Used for basic/staple merchandise.
  - Merchandise arranged according to rate of sale.
  - Placed perpendicular to main traffic aisle.

- End cap displays

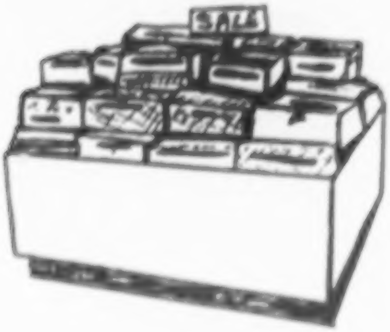


  - Placed at the end of merchandise aisle.
  - Used to produce maximum sales and profits.

  - Used to feature best selling merchandise, current "in-season" merchandise, advertised or promotional merchandise and high profit merchandise.

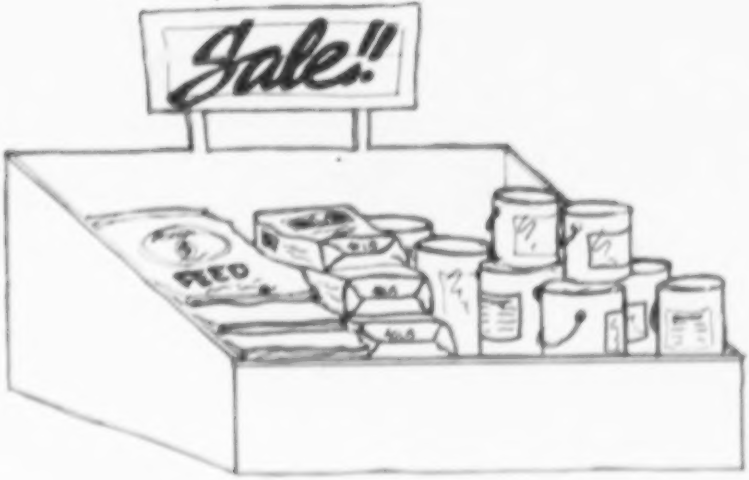
NOTE: The merchandise featured on an end cap should logically fit in with the other merchandise in the adjacent areas.

- Feature tables/island displays



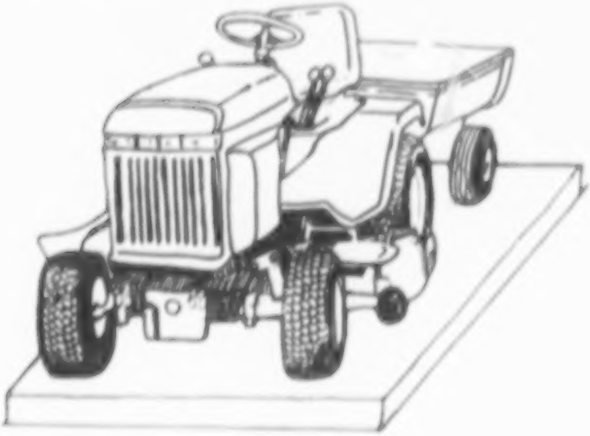
  - Use large, open tables to stack merchandise.
  - Use to display a lot of a single item, especially larger items.
  - Locate in high traffic areas where customer may reach merchandise from all sides.
  - Used to promote specially priced, new or seasonal merchandise.

- Stack-outs



  - Same concept as a feature table.
  - Use for heavy, bulky items.

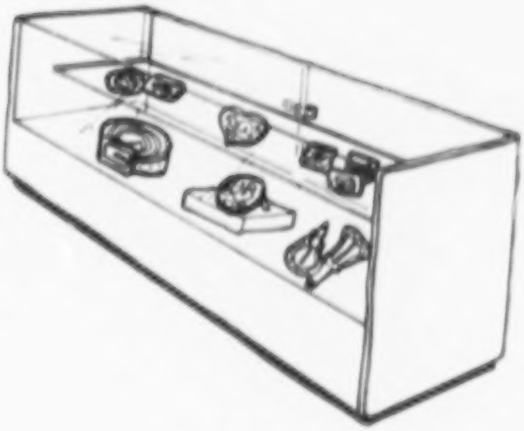
- Free standing items



  - Arrange to attract customer's attention.
  - Create favorable attention and interest by using color, signs, lighting, and props.
  - Show related merchandise along with the main featured item.

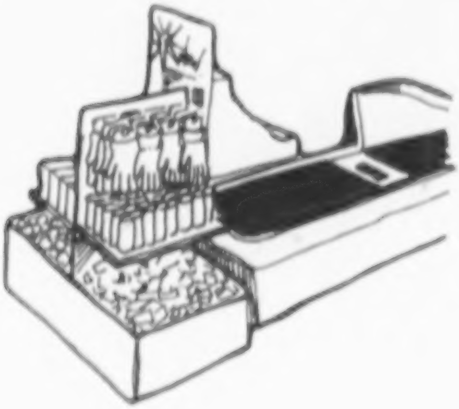
751

- Closed case display



  - Use for security in merchandising small, expensive items.
  - Use lock and key to control access to merchandise.

- Point-of-purchase (P.O.P.) display



  - Use to sell high volume, fast selling merchandise.
  - Use to feature high margin items.
  - Set up near the check-outs; on counters near related items.

NOTE: P.O.P. displays are frequently furnished and sometimes even set up by vendors to promote their products

OBJECTIVE 5 **Describe outside and window displays.**

Outside displays—Any display or other material used to create interest among passersby; often used for larger items such as cars or trucks, tractors, storage buildings, etc.; may consist of signs, pennants, banners, or other materials which create interest.

Window displays—Displays which are placed in windows that face an outside street or inside sidewalk/aisle of a shopping mall; they are designed to attract attention of passersby and prompt them to enter the store.

- Closed window displays make it possible to separate the store's interior from the display window.
- Semi-closed window displays have a half panel background, which allows customers to see past the displayed merchandise and into the store's interior.
- Open window displays have no background panel, which allows customers to see interior of store.

OBJECTIVE 6 **List the tasks that must be performed daily to ensure the layouts of basic merchandise are maintained and ready to "sell."**

- Front face, straighten and re-stock counter, tables and stock-outs
- Dust and clean shelves
- Fill bulk displays and racks
- Straighten merchandise in display cases
- Fill and sign end-caps
- Check signing for neatness and accuracy
- Spot check price tickets for accuracy
- Pull damaged merchandise off
- Retape broken boxes/bags/blister cards

- Ensure wire fencing or dividers are properly adjusted and fastened to fixture
- Check stockroom for merchandise that is ready to be placed on display and then work it into its proper location
- Remove trash and sweep area
- Ensure returned merchandise is worked into its proper location

OBJECTIVE 7 **Select from a list guidelines for setting up interior displays.**

NOTE: Suggested locations for interior displays include just inside the front door (on right side), at ends of aisles, near elevators, escalators, and stairs, in the area where items are usually sold, opposite service counters, at checkout counters, and at the back of the store. High-profit items should be displayed at eye level and low-profit items on bottom shelves.

- Design displays to show products to their best advantage.
- Use high-intensity lighting or strong contrasts in display elements such as color, shape, and size.
- Make sure display areas allow enough aisle space for customers to move freely about the store.
- Think about the merchandise adjacent the display. There should be a logical flow from one item to the next.
- Place displays perpendicular to the main traffic aisle rather than parallel so customers can stop and examine products without blocking traffic.
- Identify the items that are the most important and display them nearest to the front where they will get the most exposure.
- Use large bold figures on show cards when price is important or a point needs to be emphasized.
- Make sure arrangement of merchandise will allow customers to examine the product closely.

OBJECTIVE 8

Match elements of good display design to their correct descriptions.

- **Color**—Affects customer's buying mood; attracts customers to display

  NOTE: Too many colors in one display can confuse and even annoy a customer. Only one color should be dominant in a display.

- **Line**—Calls attention to parts of the display to create harmony; directs eye through display

- **Shape**—Physical appearance of items in a display; a variety of shapes are used in the backgrounds and arrangements for props and containers

- **Size**—Can create special effects through contrast by using different sized items

  NOTE: Be sure the objects used in a display are in proportion to each other.

- **Texture**—The look or feel of the surface of an item; can be real or imagined

- **Weight**—The impression of weight created by the appearance of the display; is affected by line, shape, size, color, and texture

OBJECTIVE 9

Match basic design principles to their correct descriptions.

NOTE: The following principles may apply to the shapes, lines, direction, sizes, weights, textures, or colors of merchandise and accessories. More than one design principle may be used in a display.

- **Contrast**—Combining opposites

  EXAMPLE: Placing a light blue denim workshirt against a dark blue background.

- **Gradation**—Connecting points of the display by a series of steps from light to dark or from small to large

- **Harmony**—Combining items to create a unified effect

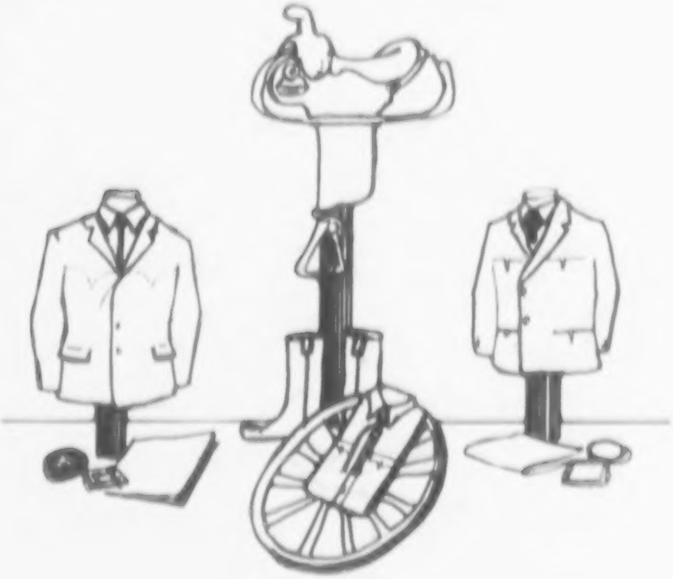
  EXAMPLES: Display of common hand tools, display of only vegetable seeds.

- **Interference**—Overlapping items to create a feeling of relatedness between items
- **Repetition**—Arranging similar items at the same angle and with the same distance between each item
- **Rhythm**—Repeating features at regular intervals or patterns

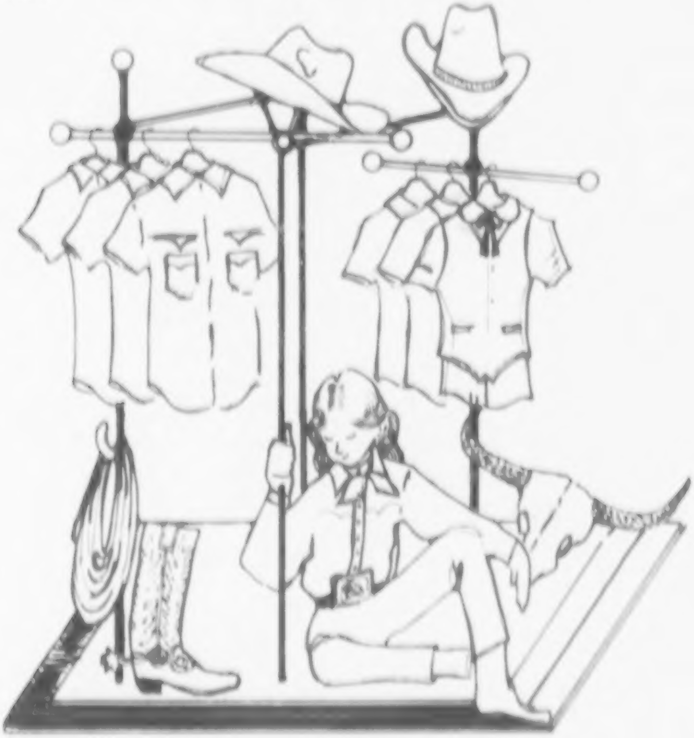
  EXAMPLES: Every other item in a display may be blue; every third implement in the display may be an old or antique farm implement

OBJECTIVE 10 **Distinguish between formal and informal balance in a display.**

- Formal balance—Elements spaced evenly on both sides of a display.



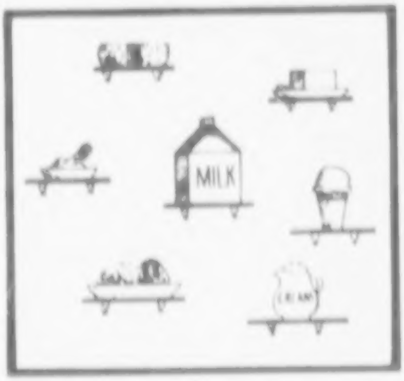
- **Informal balance**—Elements of a display not spaced the same on both sides but which appear balanced by varying the distance of larger, heavier elements, various shapes, and colors.



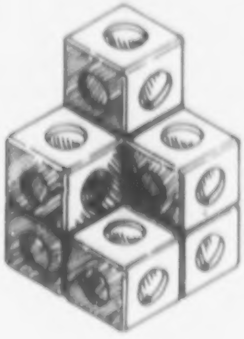
OBJECTIVE 11

Identify basic display arrangements.

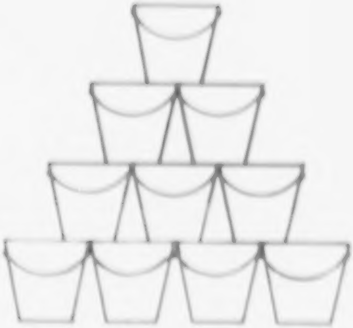
- **Radiation**—Used to show how the featured item can be combined with other related items.



- **Stairstep**—Used to add height to a display of items of the same type and to move the customer's attention from one item to the next in a logical flow.

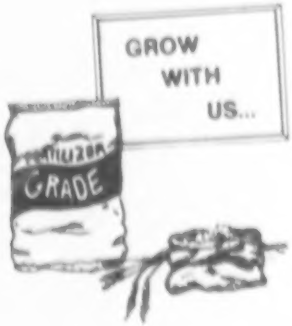


- **Pyramid**—Used primarily for mass displays of a single featured item. Suggests a bargain to the customer.

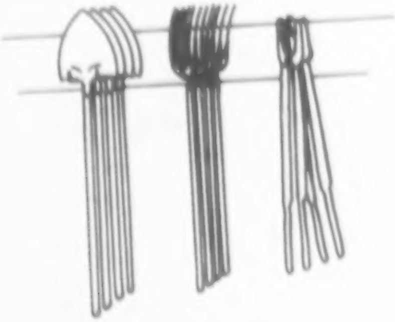


758

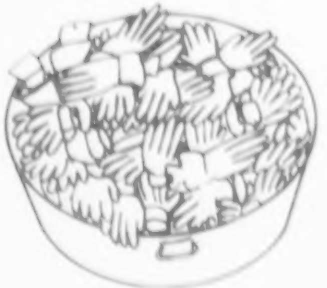
- **Zigzag**—A variation of the stair step.



- **Repetition**—Makes a strong statement to the customer that the featured item is important to your business.



- **Dump**—Gives impression of being a "special buy" or bargain



OBJECTIVE 12 **List factors to consider when using color in displays.** (Supplement 1)

- Use white light on merchandise.

  NOTE: Colored lights shining directly on merchandise often distorts its true color.

- Use one dominant color scheme and then any other colors that blend or serve as tasteful contrasts.

  NOTE: A large variety of colors or all bright colors may be distracting.

- Avoid placing any items that will fade in direct sunlight.

- Be aware of the psychology of colors for backgrounds and merchandise.

  EXAMPLES: Yellow is cheerful and warm; a black background gives the impression of space and leaves room for the imagination; red is dramatic and intense. Use blues to make glass items look expensive/of high quality (never use green with glassware).

- Remember that the theme of a display may center around a color, or color of a display may center around the theme.

  EXAMPLES: Dairy supply display may require use of black and white; merchandise of a certain color may be more appealing in a certain type of display.

OBJECTIVE 13 **Select from a list true statements about lighting techniques used in displays.**

- Emphasize the merchandise and not the background.
- Have brightest light on the dominant part of the display.
- Avoid glare.
- Avoid shadows unless they are used for special effects.
- Avoid lighting which may distort the true color of merchandise.
- Hide lighting fixtures from view.
- Work with lighting at night to discover its full effect.

OBJECTIVE 14

List steps in creating a display. (Activity Sheets 2 and 3)

1. Set a budget for displays and know the specific cost of each planned display.
2. Select a product or products.

   NOTE: Make the display design reflect the product's value. A single item in a display indicates a higher price; several items mixed together or a large number of items indicate lower-than-usual prices.

3. Develop an idea or theme.
4. Sketch the display design.
5. Select props.
6. Collect display materials needed in construction.
7. Construct the display.
8. Make any necessary adjustments.

   NOTE: Stand back and look at the display from all angles. View the display as a customer would.

OBJECTIVE 15

Name common display materials.

- Display board
- Paint
- Buildups

  EXAMPLES: Steps, platforms, tables

- Lumber
- Paper
- Fabric
- Props

  EXAMPLES: Shelves, pegboards, artificial trees or plants

- Show cards
- Lights

- **Hand and power tools**

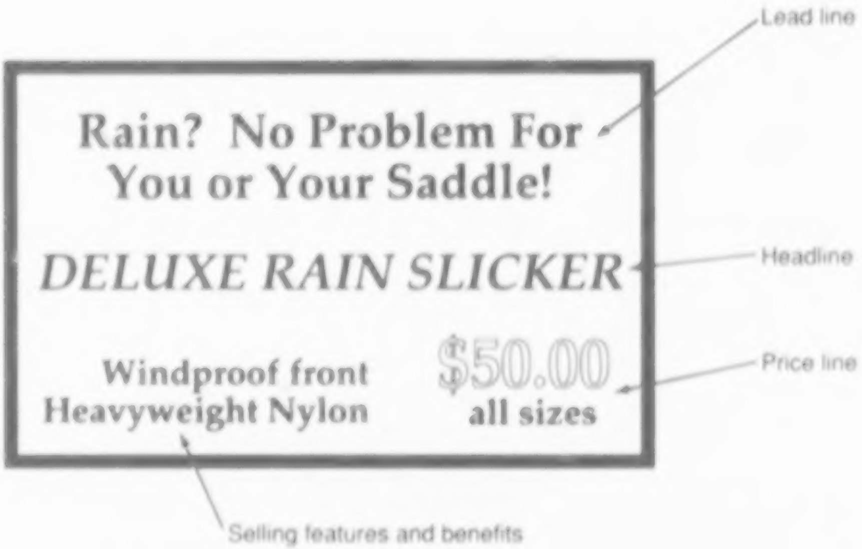
  EXAMPLES: Scissors, hammer, staple gun, saw

OBJECTIVE 16 **State purposes of show cards.**

- To identify the product or idea.
- To show price, manufacturer, uses, and/or benefits.
- To entice customers to buy.
- To give directions to location of merchandise in the store.

OBJECTIVE 17 **Identify parts of a show card.**

- Lead line
- Headline
- Selling features and benefits
- Price line


Lead line
Rain? No Problem For You or Your Saddle!
Headline
DELUXE RAIN SLICKER
Price line
Windproof front
Heavyweight Nylon
$50.00
all sizes
Selling features and benefits

OBJECTIVE 18 **List factors to consider when creating show cards.**

- Draw thumbnail sketches beforehand.
- Use generous margins on the card.
- Balance the layout.
- Write good copy.
  - Keep it short.

  NOTE: Do not try to give the entire selling message on the show card. Decide what features or benefits should be emphasized.

  EXAMPLES: Price, color, style, use, special feature
- Appeal to a specific audience.
- Use lettering style appropriate for the product.
- Make clear, legible letters.
  - Space letters evenly.
  - Have one or more full spaces between words.
  - Leave enough space between lines for easy reading.
  - Use larger letters for more important copy.

  NOTE: Check your store's policy regarding prices on show cards.
- Make necessary adjustments.

  NOTE: Look at your sign as a customer would. Be sure it reflects the character of the business.

OBJECTIVE 19 **List ways to maintain a display.**

NOTE: A checklist is a good way to maintain and improve displays.

- Turn on lights and mechanical objects used as part of the display.
- Keep aisles around display area clean.

- Keep the display clean.

  EXAMPLES: Wash glass, dust props, sweep floor

- Repair or replace parts that have been damaged.

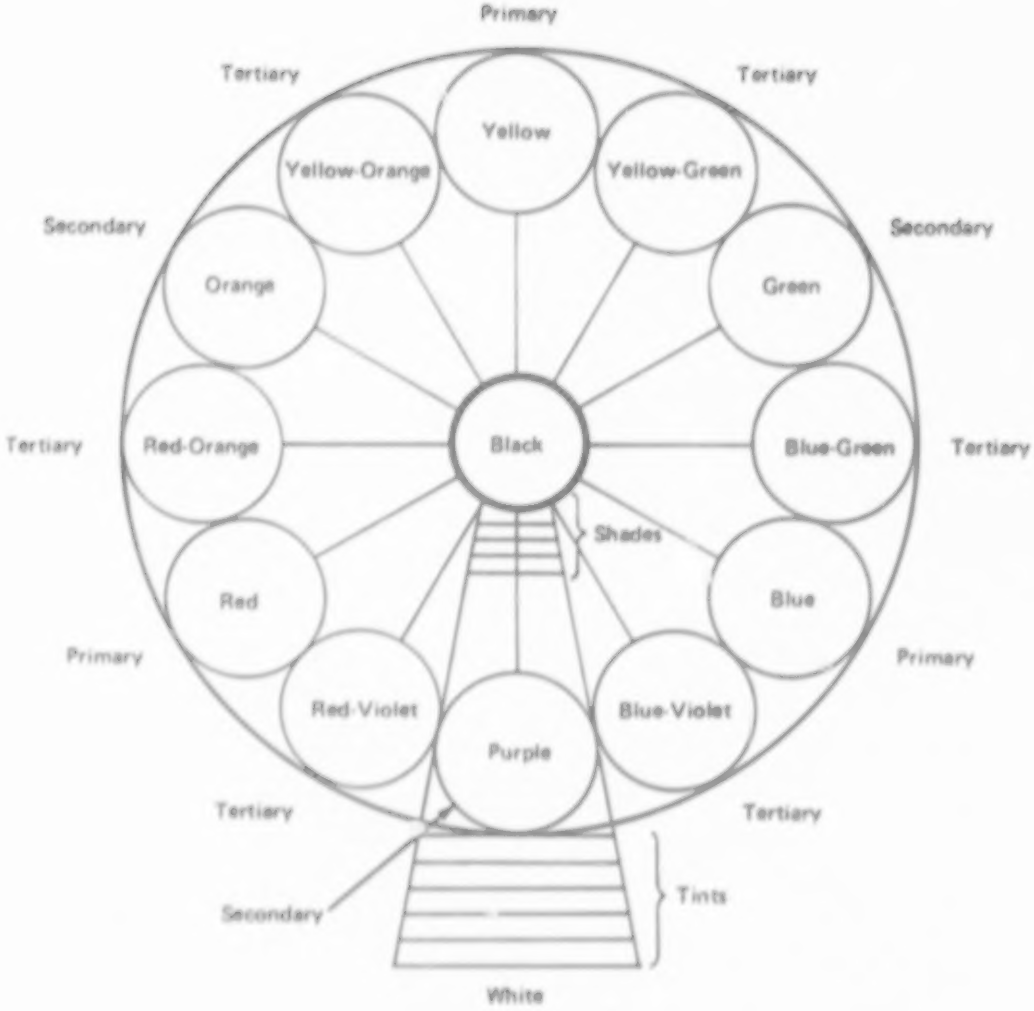
- Rearrange items that have fallen or been moved out of proper order.

- Rearrange display or make minor changes to give it a fresh appearance.

  NOTE: This is very important if display is not attracting attention and promoting merchandise.

- Restock free handouts as needed.

Color Wheel


Primary
Tertiary
Tertiary
Yellow
Yellow-Orange
Yellow-Green
Secondary
Secondary
Orange
Green
Tertiary
Red-Orange
Black
Blue-Green
Tertiary
Shades
Red
Blue
Primary
Primary
Red-Violet
Blue-Violet
Purple
Tertiary
Tertiary
Secondary
Tints
White

765

CHECKLIST FOR EVALUATING A SHOW CARD

Use the following checklist to help judge if the written copy and layout of a show card are acceptable.

EVALUATION	YES	NO
1. Are all words spelled correctly?		
2. Does the lead-in line give a reason for buying, suggested use, or major buying benefit?		
3. Are the words descriptive?		
4. Does the headline identify the merchandise by name, trademark, or brand name?		
5. Are the words and letters neatly spaced?		
6. Do the selling features point out the product features that are NOT obvious to the customer at first glance?		
7. Do the selling features answer questions the customer would want to know about the product?		
8. Is the price correctly written?		
9. Is the copy brief and to the point?		
10. Does the sign remind the prospective buyer of something wanted or needed?		
11. Is the copy short, not too many words?		
12. Is the amount of copy balanced with the size of the sign?		
13. Is the copy information understandable?		
14. Does the copy describe the products truthfully?		
15. Are the number of lines appropriate for the size of the sign?		
16. Is the sign clean?		

ACTIVITY SHEET 1 | USING DISPLAY TECHNIQUES

INTRODUCTION

Every customer entering a store will see the store front, windows, doors and cash register area. This initial impact is an important part of the store's overall "visual" presentation.

Now think like a customer and analyze a store, where you are employed or where you shop, and then compare it to two others in your community.

DIRECTIONS

Use the attached form to analyze three stores. Answer each question as objectively as you can and add comments as appropriate. Then be prepared to share your observations with the rest of the class.

Start in the parking lot and then proceed into the store.

Student Name: ____________________

Store Name: ____________________

Date Visited: ____________________

1. Is the parking lot neat and clean? ____________
2. What do you see? ____________________

   ____
3. Do you like it? ____________________
4. What needs to be done differently? ____________

   ____
5. Are the windows and doors clean? ____________
6. Are the sidewalks free of trash and litter? ____________
7. Are the store hours posted? ____________
8. Does the store have signs or banners in the windows? ______
9. Are they neat, informative and uncluttered? ____________
10. How does the store front, in general, look? ____________

    ____
11. Do you like what you see? ____________________

12. Would you change anything? ____________________

13. If so, what? ____________________

____

14. Does the store have a sale going on? ____________________

15. If so, does the store have the feel of an "event?" ____________________

16. How do you feel about the store so far? ____________________

____

17. Is the main aisle/entry clean and uncluttered? ____________________

18. Are shopping baskets/carts available? ____________________

19. Is a copy of the current ad prominently displayed? ____________________

20. Are the traffic aisles clear? ____________________

21. Are the floors well maintained? ____________________

22. How do you feel about the store's overall appearance? ____________________

____

23. What needs the most attention? ____________________

____

24. What could be done on a daily basis that would improve the store's image?

____

____

25. How does this store compare to the others you have visited?

____

____

768

ACTIVITY SHEET 2

USING DISPLAY TECHNIQUES

X

ANALYZE STORE DISPLAYS

INTRODUCTION

Store displays convey certain messages to the observer. They may promote an image of prestige for the business, or inform passersby of bargains inside, or they may simply create interest.

DIRECTIONS

Use the form on the following page to analyze three store displays. Notice the type of display, principles of design used, type of display arrangement, and use of color and lighting.

Student Name: ______________________________

Store Name: ______________________________

Date Visited: ______________________________

1. What type of display did you select to analyze?

   Interior? ______________________________
   Outside? ______________________________
   Window? ______________________________

2. What is the theme of this display? ______________________________

3. What merchandise is featured? ______________________________

4. Is the balance formal or informal? ______________________________

5. How well do the objects fit the space in relation to proportion?

6. Are the elements in this display harmonious? ______________________________

7. Discuss the use of rhythm in this display. ______________________________

8. Which of the five basic display arrangements is used in this display? ______________________________

9. Is this display well planned? Why or why not? ______________________________

770

10. Is the space used well in this display? Why or why not?

11. How could this display be improved?

12. What do you feel was the purpose of this display?

WRITE THEME IDEAS THAT CAN BE USED IN A DISPLAY

INTRODUCTION

A good theme is the foundation of an effective display. Selecting a theme will allow you to plan the use of merchandise, props, color and lighting in order to create customer interest in store merchandise.

DIRECTIONS

The following are various items which could be used in a display. Write two theme ideas for each item.

1. Display of various grains and seeds (corn, wheat, alfalfa, hay, etc.).

   Theme ideas

   a. ____

   ____

   b. ____

   ____

2. Display of various work clothes (jeans, workshirts, overalls, boots, jackets, etc.).

   Theme ideas

   a. ____

   ____

   ____

   ____

   b. ____

   ____

   ____

   ____

3. Display of farm equipment (may be outside display, with tractors, etc. or smaller equipment).

Theme ideas

a. ______________________________

____

____

____

b. ______________________________

____

____

____

____

ASSIGNMENT SHEET 1

USING DISPLAY TECHNIQUES

NAME ______________________ SCORE ________

OBJECTIVE 20 Plan a display.

INTRODUCTION Good displays are the result of good planning. The benefits of attractive and effective displays are worth the effort. Businesses not only enhance sales, but also their image in the eyes of the customer.

DIRECTIONS Using the material in the Information Sheet and the color wheel chart in Supplement 1, plan a display for an FFA activity, for example, selling Blue and Gold sausage, or an agricultural product. Write your answers in the blanks, and hand in to your instructor for evaluation along with your display sketch.

1. Name of product to be displayed ______________________
2. Idea or theme ______________________
3. Color scheme ______________________
4. Desired location of display ______________________
5. Display arrangement (stairstep, zigzag, pyramid, etc.) ______________________
6. Props to be used ______________________
7. Materials needed for construction ______________________

774

8. Display sketch

NOTE: Use labels to indicate size, shape, and distance of items. Remember to consider the principles of design and types of arrangements when doing your sketch.

ASSIGNMENT SHEET 1

The following are suggested criteria for evaluation:

Product and theme are suitable, and color scheme is appropriate. Location of display is appropriate in relation to value of the product and purpose of display. Arrangement is suitable for products and props selected; sufficient materials to construct the display are listed. Display sketch is suitable based on information above and according to information in the Information Sheet. Show card is suitable for display it accompanies and is done according to guidelines in the Information Sheet and Supplement 2.

JOB SHEET 1

USING DISPLAY TECHNIQUES

X

OBJECTIVE 21

Construct a display, including show card.

TOOLS AND MATERIALS

NOTE: Refer to your display plan prepared in Assignment Sheet 1 for a specific list of materials needed to construct the display.

PROCEDURE

1. Obtain a copy of the display plan (including thumbnail sketches).
2. Assemble tools and materials according to plan.
3. Build the basic foundation.

   NOTE: Provide the necessary strength and safety to support display materials.

4. Provide for utilities such as electricity to operate lights and motors used in display.

   WARNING: Keep wiring out of sight and place cords carefully to prevent someone from tripping or damaging the display. Do not overload the circuit.

5. Cover background and flooring with designated materials such as paint, paper, drapes, and fabric.

   NOTE: One person is usually needed to hold materials while another staples materials in place.

6. Position props according to plan and secure.
7. Add related accessories to provide realism.
8. Prepare show cards.
9. Position and secure show cards.
10. Proofread the show cards and check the background and covering for any needed touch up.
11. Evaluate display, checking it from several different angles, and make any necessary changes to make display more effective.

PRACTICAL TEST 1

USING DISPLAY TECHNIQUES

X

JOB SHEET 1

Construct a display, including show card.

Student's name ______________________ Date __________

Evaluator's name ______________________ Attempt no. ____

Instructions: When you are ready to perform this task, ask your instructor to observe the procedure and complete this form. All items listed under "Process Evaluation" must receive a "Yes" for you to receive an overall performance evaluation.

PROCESS EVALUATION

Evaluator note: Write a check mark in the "Yes" or "No" blanks to designate whether or not the student has satisfactorily achieved each step in this procedure. If the student is unable to achieve this competency, have the student review the materials and try again.

The student:	YES	NO
1. Planned display, including thumbnail sketches.	_____	_____
2. Assembled display according to plan.	_____	_____
3. Built display foundation according to display and suitable to support display.	_____	_____
4. Provided for materials such as extension cords, etc. as needed.	_____	_____
5. Covered background, floor of display as planned and hid fixtures, cords, etc.	_____	_____
6. Positioned and secured props according to plan; added related accessories.	_____	_____
7. Prepared show cards, proofed show cards, placed show cards; checked display for any needed changes.	_____	_____
8. Evaluated display from several angles to see if any changes are needed.	_____	_____

EVALUATOR'S COMMENTS

____

____

____

PRODUCT EVALUATION

Evaluator note: Rate the student on the following criteria by circling the appropriate numbers. Each criterion must receive a rating of "3" or higher to demonstrate student mastery. (See performance evaluation key). A student who is unable to demonstrate mastery should review the material and submit another product for evaluation.

Criteria:				
Display attracted attention	4	3	2	1
Showed effective use of design techniques and arrangements	4	3	2	1
Use of color, texture, etc. effective	4	3	2	1
Appropriate image or message conveyed	4	3	2	1
Merchandise shown to its best advantage	4	3	2	1

EVALUATOR'S COMMENTS

____

____

____

AVERAGE RATING

Evaluator note: To obtain an average rating for the competency profile, total the designated points in "Product Evaluation" and divide by the total number of criteria. Circle the rating on the "Performance Evaluation Key" below.

PERFORMANCE EVALUATION KEY

4 - Skilled—Can perform job with no additional training

3 - Moderately skilled—Has performed job during training program; limited additional training may be required

2 - Limited skill—Has performed job during training program; additional training is required to develop skill

1 - Unskilled—Is familiar with process; but is unable to perform job

WRITTEN TEST

USING DISPLAY TECHNIQUES

X

OBJECTIVE 1

Match terms associated with displays to their correct definitions. Write the correct letter in the blanks.

____ 1. The art of communicating visually with potential customers in order to influence their decision to purchase a product; visual merchandising

____ 2. Colors of the spectrum arranged in a circle and used to plan combinations of colors

____ 3. Display where the merchandise is protected from handling, dust, danger, or theft

____ 4. Subject or topic of display

____ 5. Display used to show merchandise so that the customer may touch it

____ 6. Fixture used to build a display

____ 7. Emphasis given to an idea or item of merchandise to attract the customer's attention

____ 8. The blueprint which shows what it will look like and what is needed to assemble the display

____ 9. Words and printed material on a show card

____ 10. Signs used in displays to give information about the featured merchandise

____ 11. The arrangement of a display so that equal attention is given to all items and parts of the display

____ 12. Impersonal selling through the use of displays

a. Show cards
b. Display
c. Theme
d. Design wheel
e. Display (thumbnail) sketch
f. Layout
g. Balance
h. Combination display
i. Copy
j. Color wheel
k. Advertising
l. Closed display
m. Color scheme
n. Open display
o. Prop
p. Focus
q. Dominance
r. Visual merchandising

OBJECTIVE 2

Select from a list the purposes of displays. Write an "X" in the blank before each true statement.

____ 1. To sell merchandise and ideas.

____ 2. To establish an image of the store and enhance its competitive edge.

____ 3. To bring customers into the store.

____ 4. To provide a place for merchandise storage.

____ 5. To suggest combinations of merchandise and related items.

____ 6. To give the impression of a profitable store.

____ 7. To promote confidence and goodwill.

____ 8. To create a pleasant shopping environment.

OBJECTIVE 3

State advantages of displays. Write three advantages in the space provided.

____

____

____

____

____

OBJECTIVE 4

Describe types of interior displays. Describe three types of interior displays.

____

____

____

____

____

____

____

____

____

OBJECTIVE 5

Describe outside and window displays. Describe outside displays and the three types of window displays.

OBJECTIVE 6

List the tasks that must be performed daily to ensure the layouts of basic merchandise are maintained and ready to "sell." List five of the tasks that must be performed daily.

OBJECTIVE 7

Select from a list guidelines for setting up interior displays. Write an "X" in the blank before each true statement.

____ 1. Make sure arrangement of merchandise will allow customers to examine the product closely.

____ 2. Include as many displays as possible in the store.

____ 3. Budget concerns are the most important factor in designing a display.

____ 4. Identify the items that are the most important and display them nearest to the front where they will get the most exposure.

____ 5. Use large bold figures on show cards when price is important or a point needs to be emphasized.

____ 6. Place displays parallel to main traffic aisle.

____ 7. Design displays to show products to their best advantage.

____ 8. Do not use high-intensity lighting or strong contrasts in display elements such as color, shape, and size.

OBJECTIVE 8

Match elements of good display design to their correct descriptions. Write the correct letters in the blanks.

____ 1. Physical appearance of items in a display; a variety of shapes are used in the backgrounds and arrangements for props and containers

____ 2. Affects customer's buying mood; attracts customers to display

____ 3. Can create special effects through contrast by using different sized items

____ 4. The look or feel of the surface of an item; can be real or imagined

____ 5. Calls attention to parts of the display to create harmony; directs eye through display

____ 6. The impression of weight created by the appearance of the display; is affected by line, shape, color, and texture

a. Color
b. Spacing
c. Line
d. Shape
e. Light
f. Texture
g. Weight
h. Size
i. Mood

OBJECTIVE 9

Match basic design principles to their correct descriptions. Write the correct letters in the blanks.

____ 1. Combining opposites

____ 2. Connecting points of the display by a series of steps from light to dark or from small to large

____ 3. Overlapping items to create a feeling of relatedness between items

____ 4. Repeating features at regular intervals or patterns

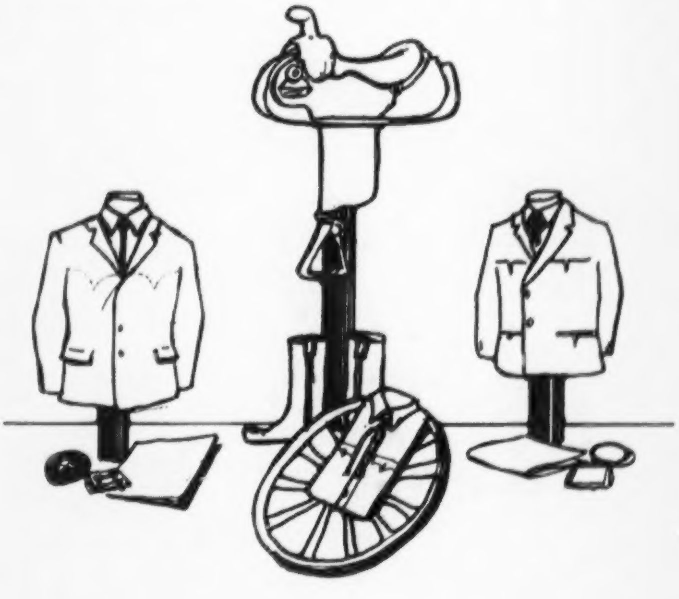
____ 5. Combining items to create a unified effect

____ 6. Arranging similar items at the same angle and with the same distance between each item

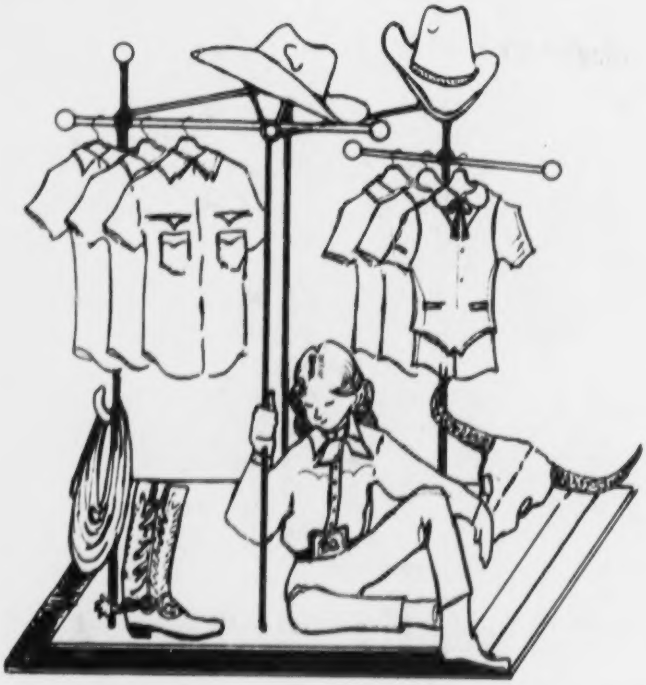
a. Contrast
b. Gradation
c. Opposites
d. Interference
e. Combinations
f. Stacking
g. Harmony
h. Rhythm
i. Repetition

OBJECTIVE 10

Distinguish between formal and informal balance in a display. Write Formal in the blank beneath the illustration of formal balance and Informal in the blank beneath the illustration of reformed balance.



1.______________________________



2. ______________________________

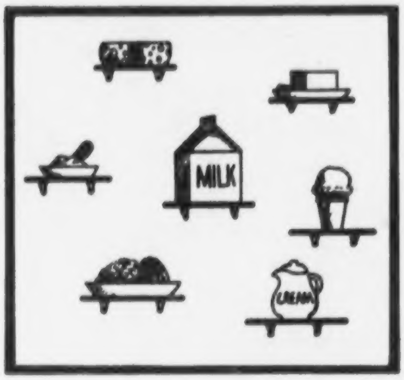
7?6

OBJECTIVE 11

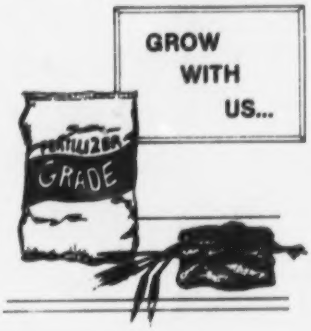
Identify basic display arrangements. Write the correct answers in the blanks.

radiation stairstep pyramid

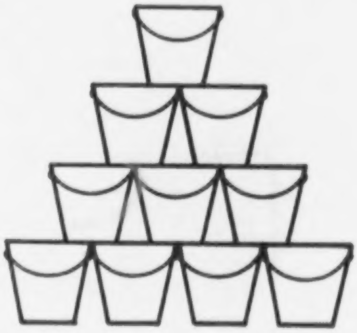
zigzag repetition dump



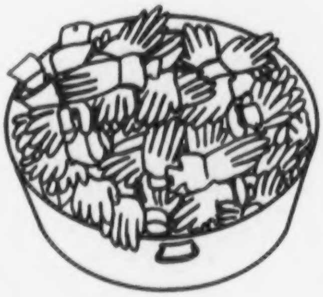
1.____________________________


GROW
WITH
US...
FERTILIZER
GRADE

2.____________________________

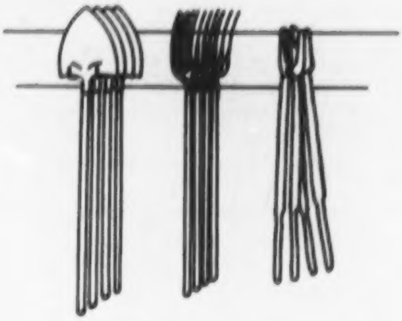


3. ______________________________

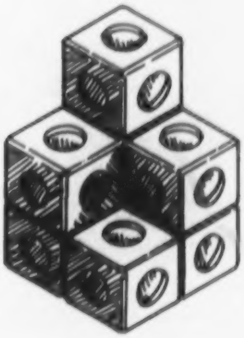


4. ______________________________

788



5.______________________________



6.______________________________

OBJECTIVE 12

List factors to consider when using color in displays. List three factors in the space provided.

OBJECTIVE 13

Select from a list true statements about lighting techniques used in displays. Write an "X" in the blank before each true statement.

____ 1. Have brightest light on dominant part of the display.

____ 2. Avoid glare.

____ 3. Use shadows in all displays.

____ 4. Emphasize both the merchandise and the background.

____ 5. Use lighting even if it distorts true color of merchandise.

____ 6. Hide lighting fixtures from view.

____ 7. Work with lighting at night to discover its full effect.

OBJECTIVE 14

List steps in creating a display.

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

OBJECTIVE 15

Name common display materials. Write six common display materials in the space provided.

OBJECTIVE 16

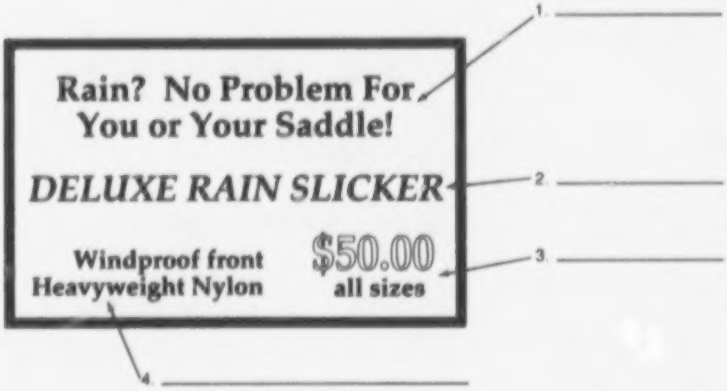
State purposes of show cards. Write the four purposes of show cards in the space provided.

OBJECTIVE 17

Identify parts of a show card. Write the correct names in the blanks.

lead line headline price line

selling features and benefits


1.
Rain? No Problem For You or Your Saddle!
DELUXE RAIN SLICKER
2.
Windproof front
Heavyweight Nylon
$50.00
all sizes
3.
4.

OBJECTIVE 18 **List factors to consider when creating show cards.** Write four factors in the space provided.

OBJECTIVE 19 **List ways to maintain a display.** Write four ways in the space provided.

NOTICE The following assignment sheet and job sheet are not a part of the written test. If these activities have not been completed, check with your instructor.

OBJECTIVE 20 **Plan a display.** SCORE ________

OBJECTIVE 21 **Construct a display, including show card.** RATING ________

WRITTEN TEST ANSWERS

USING DISPLAY TECHNIQUES

X

OBJECTIVE 1

1. b
2. j
3. l
4. c
5. n
6. o
7. q
8. e
9. i
10. a
11. g
12. r

OBJECTIVE 2

1, 2, 3, 5, 8

OBJECTIVE 3

Answer should include any three of the following:

- Involve real merchandise that can be examined by customers.
- Can be relatively inexpensive for a store to have.
- Can be changed easily to reflect trends.
- Can support advertising as part of a total promotional effort.
- Can help customers make a buying decision.

OBJECTIVE 4

Answer should include three of the following:

- Side counter/gondola displays
  - Used for basic/staple merchandise.
  - Merchandise arranged according to rate of sale.
  - Placed perpendicular to main traffic aisle.
- End cap displays
  - Placed at the end of merchandise aisle.
  - Used to produce maximum sales and profits.
  - Used to feature best selling merchandise, current "in-season" merchandise, advertised or promotional merchandise and high profit merchandise.

- Feature tables/island displays
    - Use large, open tables to stack merchandise.
    - Use to display a lot of a single item, especially larger items.
    - Locate in high traffic areas where customer may reach merchandise from all sides.
    - Used to promote specially priced, new or seasonal merchandise.

- Stack-outs
    - Same concept as a feature table.
    - Use for heavy, bulky items.

- Free standing items
    - Arrange to attract customer's attention.
    - Create favorable attention and interest by using color, signs, lighting and props.
    - Show related merchandise along with the main featured item.

- Closed case display
    - Use for security in merchandising small, expensive items.
    - Use lock and key to control access to merchandise.

- Point-of-purchase (P.O.P.) display
    - Use to sell high volume, fast-selling merchandise.
    - Use to feature high margin items.
    - Set up near the check-outs; on counters near related items.

OBJECTIVE 5

Answer should include:

- Outside displays—Any display or other material used to create interest among passerby; often used for larger items such as pickup trucks, tractors, storage buildings, etc,; may consist of signs, pennants, banners, or other materials which create interest.

- Closed window displays make it possible to separate the store's interior from the display window.

- Semi-closed window displays have a half-panel background, which allows customers to see past the displayed merchandise and into the store's interior.
- Open window displays have no background panel which allows customer to see interior of store.

OBJECTIVE 6 Answer should include any five of the following:

- Front face, straighten and re-stock counter, tables and stock-outs.
- Dust and clean shelves.
- Fill bulk displays and racks.
- Straighten merchandise in display cases.
- Fill and sign end-caps.
- Check signing for neatness and accuracy.
- Spot check price tickets for accuracy.
- Pull damaged merchandise off.
- Retape broken boxes/bags/blister cards.
- Ensure wire fencing or dividers are properly adjusted and fastened to fixture.
- Check stockroom for merchandise that is ready to be placed on display and then work it into its proper location.
- Remove trash and sweep area.
- Ensure returned merchandise is worked into its proper location.

OBJECTIVE 7 1, 4, 5, 7

OBJECTIVE 8

1. d
2. a
3. h
4. f
5. c
6. g

OBJECTIVE 9

1. a
2. b
3. d
4. h
5. g
6. i

OBJECTIVE 10

1. Formal
2. Informal

OBJECTIVE 11

1. Radiation
2. Zigzag
3. Pyramid
4. Dump
5. Repetition
6. Stairstep

OBJECTIVE 12

Answer should include any three of the following:

- Use white light on merchandise.
- Use one dominant color scheme and then any other colors that blend or serve as tasteful contrasts.
- Avoid placing any items that will fade in direct sunlight.
- Be aware of the psychology of colors for backgrounds and merchandise.

- The theme of a display may center around a color, or color of a display may center around the theme.

OBJECTIVE 13

1, 2, 6, 7

OBJECTIVE 14

1. Set a budget for displays and know specific cost of each planned display.
2. Select a product or products.
3. Develop an idea or theme.
4. Sketch the display design.
5. Select props.
6. Collect display materials needed in construction.
7. Construct the display.
8. Make any necessary adjustments.

OBJECTIVE 15

Answer should include any six of the following:

- Display board
- Paint
- Buildups
- Lumber
- Paper
- Fabric
- Props
- Show cards
- Lights
- Hand and power tools

OBJECTIVE 16

- To identify the product or idea
- To show price, manufacturer, uses, and/or benefits
- To entice customers to buy
- To give directions to location of merchandise in the store

OBJECTIVE 17

1. Lead line
2. Headline
3. Price line
4. Selling features and benefits

OBJECTIVE 18

Answer should include any four of the following:

- Draw thumbnail sketches beforehand
- Use generous margins on the card
- Balance the layout
- Write good copy
- Appeal to a specific audience
- Use lettering style appropriate for the product
- Make clear, legible letters
- Make necessary adjustments.

OBJECTIVE 19

Answer should include any four of the following:

- Turn on lights and mechanical objects used as part of display.
- Keep aisles around display area clean.
- Keep the display clean.
- Repair or replace parts that have been damaged.
- Rearrange items that have fallen or been moved out of proper order.

- Rearrange display or make minor changes to give it a fresh appearance.
- Restock free handouts as needed.

OBJECTIVE 20 Refer to answers to Assignment Sheet 1.

OBJECTIVE 21 Refer to Practical Test for Job Sheet 1.

OBJECTIVE SHEET

ADVERTISING

XI

INTRODUCTION

The salesperson's job would be a lot more difficult if there was no such thing as advertising. A lot of time might be wasted in telling prospects and customers about what is being sold. It costs money to make a sales call, and a salesperson can spend more time in actual selling if customers are informed in advance about the particular company and the products or services being sold.

The salesperson's job is easier if the right goods and services are advertised at the right time, in the right way, to the right people, with the right technique. It is important for all involved in sales to have a good understanding of advertising and its role in the selling process.

UNIT OBJECTIVE

After completing this unit, the student should be able to analyze newspaper advertisements and radio announcements. The student should also be able to design a newspaper ad, prepare a news release and prepare a radio spot announcement. The student will demonstrate these competencies by completing the assignment sheets and written test with a minimum of 85 percent accuracy.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to

1. Match terms associated with advertising to their correct definitions.
2. Discuss the functions of advertisements.
3. State the advantages and disadvantages of advertising.
4. List the advantages and disadvantages of various major advertising media.
5. Select from a list the kinds of merchandise to advertise.
6. Name the factors that determine when to advertise.
7. Name the factors to consider in selecting advertising media.
8. Label the major parts of an advertising layout.
9. Select from a list true statements about the characteristics of good advertising layout.
10. Select from a list true statements about the characteristics of a good headline.

11. Select from a list purposes of subheadings.
12. Select from a list true statements about the characteristics of good copy.
13. Select from a list true statements about illustrations.
14. List ways to assure wise use of white space in an ad.
15. Name factors to remember when selecting color for an ad.
16. Define terms describing the stages of an ad layout.
17. Name additional forms of advertising media.
18. Analyze newspaper advertisements. (Assignment Sheet 1)
19. Analyze radio announcements. (Assignment Sheet 2)
20. Utilize product information to design a newspaper ad. (Assignment Sheet 3)
21. Utilize product information to prepare a news release. (Assignment Sheet 4)
22. Utilize product information to prepare a radio spot announcement. (Assignment Sheet 5)

PREPARATION

- Obtain materials to supplement unit.

  NOTE: See Suggested Resources.

- Review instructional outline for this unit. Modify time frames to suit class needs and plan activities for each class period.

- Study the specific objectives to determine those you will cover in your presentation. Decide also which objectives should be taught to which students.

- Determine scope and sequence of objectives that you add. Design and develop support materials, including evaluation techniques, for additional objectives.

- Determine how you will schedule time for students to demonstrate competence in the required procedures.

- Make arrangements for guest speakers. Supply speakers with specific objectives and other appropriate sections of the unit.

- Use a tape recorder to record two radio commercials for use with Assignment Sheet 2. Tapes of commercials which are no longer used may be available at a local radio station.

- Prepare classroom.

  - Put up posters, charts, etc. dealing with advertising techniques and/or examples of good advertisements.

  - Have articles, brochures, and other items dealing with advertising and layout techniques.

  - Provide magazines for students to find examples of various advertisements, layouts and design techniques.

DELIVERY

Objective 1

- Discuss the use of slogans and their role in creating an image for the sponsoring company.

  EXAMPLE: "You cared enough to send the very best" (Hallmark cards) and "Nothing runs like a Deere" (John Deere and Co.) convey a quality message to the public.

- Ask students to comment on local agribusiness's slogans/advertising and how they either enhance or detract from the company's image.

- Invite a representative from an advertising agency, advertising manager of an agribusiness, or an agribusiness manager/owner to discuss the importance of advertising in the selling process.

- Arrange for the class to take a field trip to an advertising agency, the advertising department of a large company, or the ad layout department of your local newspaper.

- Discuss terms and definitions. Provide students with examples to illustrate terms, if possible.

- Use Transparency Master 1.

Objective 2

- Discuss the functions of advertising. Emphasize how the type and quality of advertising reflects on the image of the business.

Objective 3

- Discuss the advantages and disadvantages of advertising.

Objective 4

- Discuss agribusinesses the students are familiar with and identify the various media they are using and the probable reasons for selecting the media.

Objective 5

- Discuss the kinds of merchandise to advertise.

- Ask the students to call out examples of each type of merchandise listed and tell why they feel those items are appropriate for advertising.

Objective 6

- Discuss factors that determine when to advertise.
- Use Transparency Master 2 to discuss when to advertise.
- Ask students to suggest some additional examples.

Objective 7

- Discuss the media choices of some local businesses to see how they are either applying or overlooking these "factors."

Objective 8

- Discuss the major parts of an ad.
- Have students review sample ads and identify the major parts in each one.

Objective 9

- Use Transparency Master 3 to discuss the basic path of the reading eye.
- Bring sample ads to class and discuss how well they utilize the principles in the Information Sheet.
- Discuss proportion and harmony using Transparency Masters 4 and 5.

Objective 10

- Review sample ads to see how effective they are in using headlines.

Objective 11

- Discuss subheadings and their purposes.
- Examine sample ads for the correct use of subheadings.

Objective 12

- Discuss characteristics of good copy.
- Examine sample ads for the correct use of copy in the ads.

Objective 13

- Discuss the use of illustrations in advertisements.
- Use Transparency Master 6.
- Examine some sample ads for the correct use of illustrations.

Objective 14

- Use Transparency Masters 8, 9, and 10 to discuss white space, borders and when elements may touch the borders.
- Examine sample ads for examples of these principles.

Objective 15

- Discuss factors to consider when selecting color for an ad.

Objective 16

- Discuss stages in developing ad layouts.
- Obtain samples of thumbnail sketches, rough drafts and comprehensives from your local newspaper, art department, or ad agency.
- Have a guest speaker discuss the various layout principles covered up to this point with the class.

Objective 17

- Discuss the various other types of media that are available to agribusinesses.

APPLICATION

Objective 18

- Use Assignment Sheet 1 to give students practice in analyzing newspaper advertisements.

Objective 19

- Use Assignment Sheet 2 to give students practice in analyzing radio announcements.

Objective 20

- Use Assignment Sheet 3 to give students practice in utilizing product information to design a newspaper ad.

  NOTE: Be prepared to assist students in selecting appropriate products or services to advertise.

Objective 21

- Use Assignment Sheet 4 to give students practice in utilizing product information to prepare a news release. Have students refer to Supplement 1.

Objective 22

- Use Assignment Sheet 5 to give students practice in utilizing product information to prepare a radio spot announcement. Have students refer to Supplement 2.

EVALUATION

Written Test

- Explain to students that they will be asked to demonstrate on the written test actions listed in the specific objectives.
- Give written test.

  NOTE: The written test may be given in sections if desired.

- Evaluate students on assignment sheet activities if not previously done.
- Reteach and retest if necessary.
- Complete appropriate section of competency profiles.
- Review individual and group performance in order to evaluate teaching methods. Adjust scope, sequence, or instructional approaches for additional lessons as required.

SUGGESTED RESOURCES

Publications

- Burton, Philip W., and William Ryan, *Advertising Fundamentals*, 3rd ed., Grid Publishing, Inc., Columbus, Ohio, 1980.

- Ernest, John W., and Richard D. Ashmun, *Selling Principles and Practices*, 5th ed., McGraw-Hill, Inc., New York, 1980.
- Kaatz, Ron, *Advertising and Marketing Checklists*, NTC Business Book, a division of NTC Publishing Group, Lincolnwood, Illinois, 1989.
- Sharp, Harold S., *Advertising Slogans of America*, The Scarecrow Press, Inc., Metuchen, N.J. and London, 1984.
- Wingate, John W. and Carroll A. Nolan, *Fundamentals of Selling*, South-Western Publishing Co., Cincinnati, Ohio, 1976.

UNIT REFERENCES

- Bellavance, Diane, *Advertising and Public Relations for a Small Business*, 4th ed., DBA Books, Boston, Massachusetts, 1987.
- Burton, Philip W., and William Ryan, *Advertising Fundamentals*, 3rd ed., Grid Publishing, Inc., Columbus, Ohio, 1980.
- *Business Management and Ownership*, Oklahoma Department of Vocational and Technical Education, Curriculum and Instructional Materials Center, Stillwater, Oklahoma, 1982.
- *Distributive Education II*, Oklahoma Department of Vocational and Technical Education, Curriculum and Instructional Materials Center, Stillwater, Oklahoma, 1976.
- Ernest, John W., and Richard D. Ashmun, *Selling Principles and Practices*, 5th ed., Gregg Division, McGraw-Hill, Inc., New York, 1980.
- Kaatz, Ron, *Advertising and Marketing Checklist*, NTC Business Books, a division of NTC Publishing Group, Lincolnwood, Illinois, 1989.
- Sharp, Harold S., *Advertising Slogans of America*, the Scarecrow Press, Inc., Metuchen, New Jersey and London, 1984.
- Wills, F.H., *Fundamentals of Layout5, Dover Publications, Inc., New York, 1965.*
- Wingate, John W., and Carroll A. Nolan, *Fundamentals of Selling*, 10th ed., South-Western Publishing Co., Cincinnati, 1976.

BASIC ACADEMIC SKILLS

The following table identifies the basic academic skills that are reinforced in this unit of instruction. These basic academic skills were identified using *The Basic/Essential Skills Taxonomy*, second edition and verified during the validation process.

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 1	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 2	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
OBJECTIVE 3	Language Arts 132	Comprehends	Information-written	
	Language Arts 137	Comprehends	Information-written	Comparisons/ contrasts
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 4	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 5	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 6	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 7	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 8	Language Arts 214	Identifies	Information-written	
OBJECTIVE 9	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 10	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 11	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 12	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 13	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 191	Evaluates	Information-written	Validity
OBJECTIVE 14	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 15	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 16	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 17	Language Arts 132	Comprehends	Information-written	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
OBJECTIVE 18	Language Arts 180	Evaluates	Information-written	
	Language Arts 031	Appreciates	Author's style/ approach	Organization/ structure
	Language Arts 181	Evaluates	Information-written	Adequacy/ sufficiency
	Language Arts 182	Evaluates	Information written	Appropriateness

	SKILL AREA/ CODE	VERB	LINK A	LINK B
	Language Arts 183	Evaluates	Information-written	Clarity
	Language Arts 186	Evaluates	Information-written	Propaganda techniques
OBJECTIVE 19	Language Arts 167	Evaluates	Information-oral	
	Language Arts 169	Evaluates	Information-oral	Adequacy/ sufficiency
	Language Arts 170	Evaluates	Information oral	Appropriateness
	Language Arts 171	Evaluates	Information-oral	Clarity
	Language Arts 173	Evaluates	Information oral	Non-print media
	Language Arts 174	Evaluates	Information-oral	Propaganda techniques
OBJECTIVE 20	Language Arts 049	Composes/ Edits	Audio-visual aids	
	Language Arts 058	Composes/ Edits	Forms/ documents	
	Language Arts 008	Adapts	Strategy	Writing
OBJECTIVE 21	Language Arts 049	Composes/ Edits	Audio-visual aids	
	Language Arts 094	Composes/ Edits	Persuasive text	
	Language Arts 008	Adapts	Strategy	Writing
	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying

811

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 22	Language Arts 049	Composes/ Edits	Audio-visual aids	
	Language Arts 094	Composes/ Edits	Persuasive text	
	Language Arts 008	Adapts	Strategy	Writing
	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying

OBJECTIVE 1

Match terms associated with advertising to their correct definitions. (Transparency Master 1)

- **Advertisement**—A message, paid for by a sponsor, which informs people about a company and its services

  NOTE: An advertisement may present information about the company itself, its products and services, or its personnel.

- **Advertising agency**—Business which conducts market research and plans and executes advertising campaigns for firms and companies

- **Column inch**—Method of measuring and paying for some newspaper ads

  NOTE: A column inch is one inch deep by one column in width.

- **Cooperative advertising**—System of advertising in which the manufacturer and the local business share in the cost of delivering their message

- **Copy**—The main body or text of an advertisement

- **Focal point**—Spot within a rectangle where the eye naturally pauses; the prime focal point is usually slightly above and to the left of the exact center

- **Goodwill**—Intangible, salable asset representing the reputation of a business and its relationship with its customers

- **Institutional advertising**—Advertising used primarily to build customer goodwill and to present the store as a good place to shop

  NOTE: This is done by emphasizing the business's prestige or service. Institutional advertising also includes public service advertisements.

- **Layout**—Arrangement of copy and illustrations on the printed page

- **Leader**—Merchandise sold at a reduced price or even at a loss in order to attract customers into the business

  NOTE: If merchandise is sold at a loss it is known as a loss leader.

- **Logo/signature cut**—Name or symbol of the store or company

- **Media**—System for delivering an advertised message

- **Milline rate**—Cost of a single line of newspaper space per each million people reached by the newspaper circulation

- **Omnibus advertising**—Advertisement that contains a variety of unrelated items

- **Prime time**—Time when the largest number of people listen to the radio or watch television

  NOTE: Since primetime reaches most people, it is the most expensive time to advertise.

- **Promotional advertising**—Advertising which mainly attempts to sell specific merchandise

- **Proof**—Copy of an advertisement which is given to the advertiser to be checked for errors before being printed

- **Publicity**—Presentation of facts which may be free and may not have an identified sponsor

  EXAMPLE: A newspaper article to gain attention about a new store opening or employee's promotion

- **R.O.P. (Run of Paper)**—Advertisement that may be placed anywhere in the newspaper as opposed to specifying a particular section of the newspaper or position of the ad on the page

  NOTE: It is usually less expensive to advertise R.O.P. than to guarantee position.

- **Shopper**—Newspaper which contains many advertisements by local businesses and is provided free of charge to local residents

- **Slick book (clip art)**—Book supplied by printing shops and newspapers from which advertisers may select illustrations of all types, sizes and brand names

- **Sponsor**—Company or individual who pays for an advertisement

- **Spot announcement**—Radio or television commercial that ranges from 10 to 60 seconds in length; usually purchased as a package of 10, 20, or 30 advertisements

- **Type face—Style of letters**

  NOTE: The four main classes of type are Roman, Sans Serif, Script and black letter. Each class contains hundreds of styles.

  EXAMPLES: Roman, script, Futura medium, Gothic

OBJECTIVE 2

Discuss the functions of advertisements.

Advertisements must convey an accurate message to the consumer. Advertisements can be aimed at selling products or services or promoting goodwill toward the company.

The three major functions of an advertisement are:

- Attract the attention of the consumer.

- Inform them about your product, service, company or idea.

- Convince them to purchase your product or service or have a feeling of goodwill toward the company.

NOTE: Be sure to list important information that the consumer needs to know such as the name and location of the business. You may also want to include your phone number and operating hours.

OBJECTIVE 3

State the advantages and disadvantages of advertising.

Advantages

- It quickly gains attention.

- It reaches individuals at a much lower cost per contact as compared to personal selling.

- The content of advertising can be controlled by the selling company.

Disadvantages

- It is nonpersonal in nature and is less compelling than any personal contact by a salesperson.
- It cannot answer all the questions of a potential customer.

  NOTE: Advertising may attempt to anticipate questions and objections, but cannot deal with them specifically.

OBJECTIVE 4 **List the advantages and disadvantages of various major advertising media.**

Media	Advantages	Disadvantages
Newspaper	• Is widely read • Is relatively inexpensive • Can be changed relatively quickly	• Has a short reading life NOTE: A newspaper does not usually lay around long.
Magazines	• Adds prestige to a product or business • Can get effective use of color • Has a long reading life • May reach select reading audience EXAMPLES: May carry different ads for different parts of the country in the same magazine • Is a good way to educate consumers about a product or service	• Is relatively expensive • May waste circulation unless business's trading area is quite large • Is not easy to change on short notice
Direct Mail	• Has direct and personal appeal to one group May be used to make immediate sales by enclosing an order blank • Is relatively inexpensive if special postal rates can be obtained	• Requires that the mailing list be constantly revised • May be ignored by some people as merely "junk" mail

Media	**Advantages**	**Disadvantages**
Radio	• Is suited for products of general demand because of large diversified audience • Can be changed relatively easily • Can be repeated frequently • Is relatively inexpensive	• May waste coverage on many people who are not potential customers • Is not suited for products that must be seen to develop customer interest
Television	• Has a large diversified audience • Is good for national advertising • Adds prestige to a product or business • Is easy to show demonstration of a product	• Is expensive

OBJECTIVE 5 **Select from a list the kinds of merchandise to advertise.**

- **Best sellers**
  - The first rule in selecting merchandise for advertising is to narrow the selection down to a few that are sure sellers.
- **Traffic builders**
  - These items frequently are not big profit items, but rather are in constant demand. These items build store traffic that enhances the opportunities to sell other nonadvertised items.
- **New items and styles**
- **Nationally advertised items**
- **Reduced items**
  - Includes promotional as well as clearance markdowns.

- **Timely merchandise**

  EXAMPLES: Anti-freeze, snow shovels, bedding plants, garden hose, mowers

OBJECTIVE 6

Name the factors that determine when to advertise.
(Transparency Master 2)

- Heavy promotional periods

  EXAMPLES: Anniversary sales, end-of-season clearance, planting and harvest, holidays and special events such as Christmas and rodeo days

- Day of the week that is best for the type of store, product, and customers

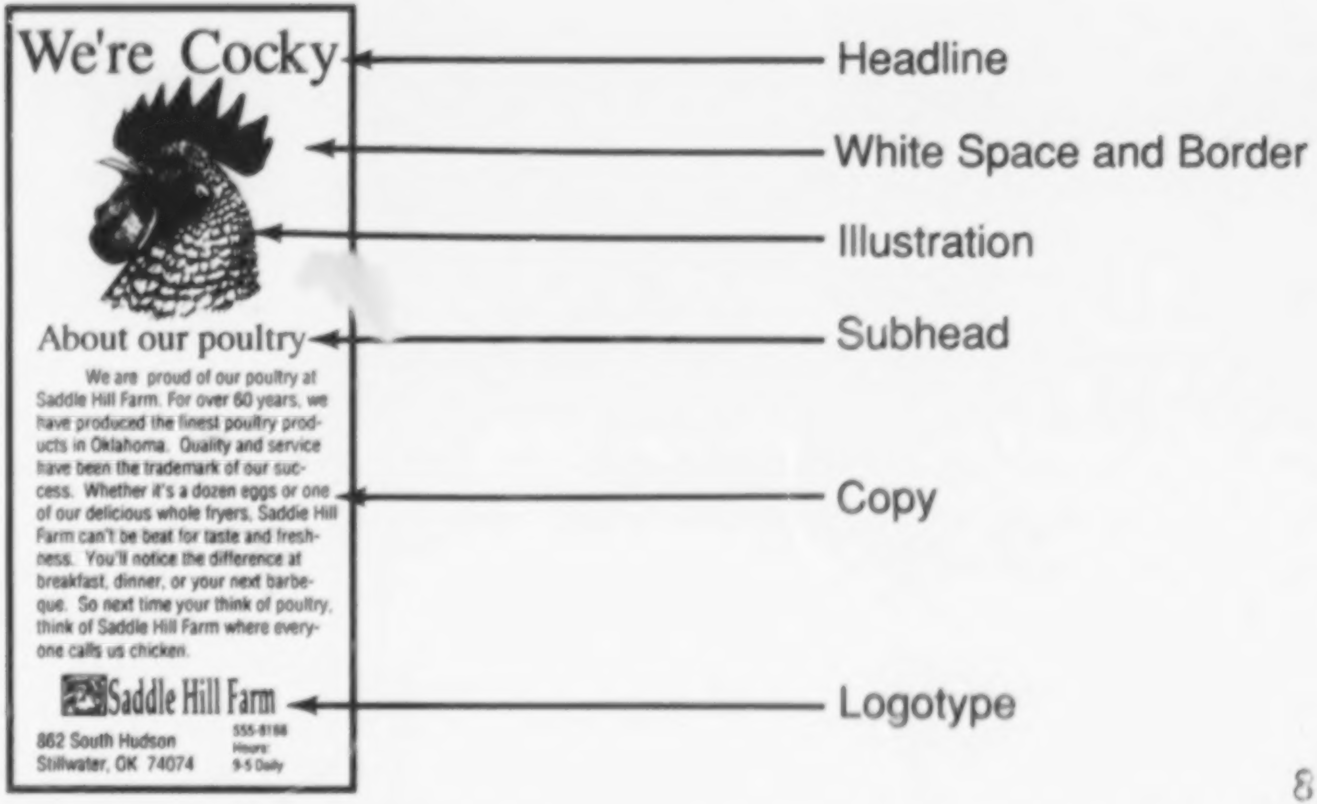
  EXAMPLES: Wednesday and Thursday for weekend grocery shopping; Sunday when people may have more time to read the newspaper

OBJECTIVE 7

Name the factors to consider in selecting advertising media.

- What is the market coverage of the medium?
- What type of audience does the medium appeal to?
- What types of business advertising is the medium particularly suited for?
- What are the advantages of the medium?
- What are the disadvantages of the medium?

Major Parts of an Advertising Layout



We're Cocky

About our poultry

We are proud of our poultry at Saddle Hill Farm. For over 60 years, we have produced the finest poultry products in Oklahoma. Quality and service have been the trademark of our success. Whether it's a dozen eggs or one of our delicious whole fryers, Saddle Hill Farm can't be beat for taste and freshness. You'll notice the difference at breakfast, dinner, or your next barbeque. So next time your think of poultry, think of Saddle Hill Farm where everyone calls us chicken.

Saddle Hill Farm

862 South Hudson
Stillwater, OK 74074

555-8188
Hours:
9-5 Daily

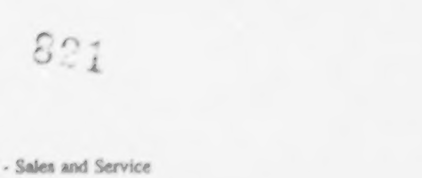
OBJECTIVE 8 | Label the major parts of an advertising layout.

OBJECTIVE 9 **Select from a list true statements about the characteristics of good advertising layout.** (Transparency Master 3 through 5)

- Should direct the eye smoothly from the top of the ad, through the center, to the bottom of the ad.
  - When developing an ad layout keep in mind the basic path of the reading eye is this southeasterly sweep, the reading diagonal.
  - When properly used, white space, lines, direction the illustrations are facing, and copy can help the eye move along this path.
- Often follows the shapes of letters of the alphabet.

  NOTE: The most widely used is the reverse "S". The regular "S" is another favorite. Triangles can also be very powerful in advertisements. An "L" facing either way is another classical composition. The letters T, Y, and U are also classic basic compositions. Other letters that have been used are: C, Z, J, I, A, H, O, K
- Should keep each element of the ad in proportion and harmony with the other elements.

  NOTE: In a layout pattern, one element should definitely dominate. This element acts as the starting point for the eye of the reader.
- May use attention-getters.



OBJECTIVE 10 **Select from a list true statements about the characteristics of a good headline.**

NOTE: The headline sets the theme of an advertisement and determines approximately 75% of its effectiveness.

- Catches prospective customer's attention.
  - Stresses "you" and "yours."
  - Arouses curiosity.
  - Sounds like exciting news.
  - Relates headlines to illustrations.
- Leads prospective customers to read the rest of the ad.
  - Indicates the content of the ad.
  - Stresses customer benefits.
  - Appeals to customer's buying motives.

  EXAMPLES: Profit motive, health, fear, administration, physical comfort, fun and pleasure, convenience, etc.
- Is always honest.

  NOTE: Dramatize but don't exaggerate the claims for your product.
- Is easy to read.
- Is timely.
- Uses action verbs whenever possible.

  EXAMPLES: Take a quick look at . . .
  Ask any . . .
  Savor the flavor . .
- Uses persuasive selling words.

  EXAMPLES: You, money, save, new, free, friend, results, health, easy, safety, quick, now, love, proven, guarantee, bargain

- Is easily recognized as the store's ad before seeing the logo because of the ad's entire style.

  NOTE: Many of the above points apply throughout the ad, as well as to the headline.

OBJECTIVE 11

Select from a list purposes of subheadings.

- Breaks monotony and adds excitement.
- Explains the headline further.
- Gives clues to the main points covered in each block of copy.
- Helps the reader choose those parts of the ad in which he or she is most interested.
- Helps sales.

OBJECTIVE 12

Select from a list true statements about the characteristics of good copy.

- Gives the reason for buying the product and is based on buying motives and customer benefits.
- Gives the reason for shopping in the store.
- Urges the reader to buy now.

  EXAMPLES: "Limited supply"
  "This week only"

- Avoids cliche's.

  EXAMPLES: "Tried and true"
  "Last but not least"

- Avoids abbreviations.
- Uses specific descriptions.

  EXAMPLES: Instead of saying you have the best brands, list them.

- Includes important store information.

  EXAMPLES: Address, telephone number, credit cards accepted, business hours, free parking

- Sounds enthusiastic.
- Is informative and believable.
- Is fun to read.
- Does not use more than three type faces.
- Uses mostly complete sentences.
- May begin with bold letters.

OBJECTIVE 13 **Select from a list true statements about illustrations.** (Transparency Master 6)

- Presents merchandise effectively.
- Guides the reader's attention to the advertising message.
- Should have all related items priced.
- May be the dominant attention-getter for the ad.

  EXAMPLES: Action pictures, photographs of local people and children, animal pictures

OBJECTIVE 14 **List ways to assure wise use of white space in an ad.** (Transparency Masters 8 through 10)

NOTE: A lot of white space gives a feeling of luxury or prestige. A lot of black print gives more of a feeling of bargains.

- Indent from the thin column border before beginning the ad's border.
- Use simple panel forms to help group information.
- Allow elements of the layout to touch the boundary only once on each of the four sides.

OBJECTIVE 15 **Name factors to remember when selecting color for an ad.**

- Use color only if it dramatizes the merchandise and increases sales enough to justify the additional cost.

- Use only the purest and brightest colors.

  NOTE: Red is one of the most effective colors to use in an ad.

OBJECTIVE 16 **Define terms describing the stages of an ad layout.**

- **Thumbnail sketch—**Small outline with a few lines and shapes to show the placement of the headline, copy, illustration, and logo.
- **Rough draft—**Best thumbnail sketches enlarged and drawn a number of times until all the elements are the exact size and position.
- **Comprehensive (sometimes called "semi-comprehensive" or "semi-comp")—**Traced from the rough layout with enough detail added to show how the finished advertisement will look.

OBJECTIVE 17 **Name additional forms of advertising media.**

- **Shopping news—**Newspaper consisting mainly of advertisements and usually distributed free of charge.

  NOTE: They may be picked up in local businesses, mailed, or placed inside a regular newspaper.
- **Car-card advertising—**Advertising placed in buses, on taxis, in airports, and on the sides of automobiles.
- **Outdoor advertising—**Billboards, posters, painted walls, and electrical signs.
- **Directory advertising—**Ad placed in the yellow pages of telephone directories.
- **Program advertising—**Advertising which is done mainly as a public service or charity since few sales are generated by this type of advertising.

  EXAMPLES: Yearbooks, special event programs
- **Specialty advertising—**Free item with the business's name on it; given to create goodwill, gain the customer's attention, and keep the business's name in the customer's minds.

  EXAMPLES: Ink pens, calenders, coffee mugs, caps

- **Catalog—**Publication printed on a regular basis by mail order companies or on special occasions for a particular store or company.

- **Handbills—**Advertisement distributed door to door, placed on parked cars, or placed in sacks to announce grand openings and special promotions.

- **Table tent—**Stand-up card placed on tables in restaurants.

WRITING A NEWS RELEASE

1. Write the heading in the upper left corner of the page.

   - Name of sponsor
   - Sponsor's address and telephone number

   NOTE: If you have a letter head, use it.

2. Write the release date in the upper right corner.

   NOTE: This is the date that you want your publicity release to be run in the newspaper.

3. Begin typing the copy approximately one-third down from the top of the page.

   NOTE: This leaves room for the newspaper editor to insert the heading.

   - Double space the copy
   - Use complete sentences
   - Use short sentences
   - Don't use trite words or figures of speech
   - Be direct and specific
   - Try to limit the news release to one page

4. The lead, or first paragraph should contain critical information.

   - Who—The people or firm involved
   - What—The news item
   - When—The date and time
   - Where—The location of the event
   - Why—The reason for having the event

5. End the release with a complete paragraph.

   NOTE: If the release takes more than one page, the word "MORE" should be typed at the bottom of the page.

6. Type "###" to indicate the end of the release.

NEWS RELEASE

Fernand County Co-op
Bud Miller
Fernand, OK 74201
555-2934, ext. 51

Immediate Release
November 1, 199X

Dr. Cy Ross, of the R & P Feed Co., Kansas City, Missouri, will be conducting an equine nutrition seminar on December 1st, at the Fernand County Co-op from 9 a.m. to 4 p.m. "Feeding the Horse in Your Life" covers: The Digestive System of the Horse, Feed Nutrients, Feeds for Horses, and Balancing Rations for Horses. The seminar is open to the public and is free. Registrations are being accepted now. For more information and to register call Bud Miller at 555-2934, ext. 51.

# # #

WRITING RADIO ANNOUNCEMENTS

1. Write for an audience that is "hearing" your message, not seeing it.

   - Build copy around one central idea.
   - Make listeners "see through their ears."
   - Write "talk" language in contractions and often in sentence fragments.
   - Use conversation bridges instead of paragraphs.

   EXAMPLES: "Here's another point . . ."
   "Remember, too . . ."
   "But that isn't all . . ."

2. Assume listeners are giving half-attention.

   - Work especially hard to achieve attention-getting opening.
   - Repeat important ideas, words or phrases.
   - Picture the typical listener when writing the commercial.

3. Disregard print rules about starting the selling immediately.

   - "Slide" into the selling message instead of stressing main sales point in the opening words.
   - Use a line or two to set the stage.

4. Don't write too much but don't write too little.

   - Pace commercial to announcer, product and situation.

   NOTE: Write as little as 100 words per minute. Write 150-170 words, and even up to 185 or more for very hard sell.

5. Use music and sound effects to gain interest and attention, and to lessen irritation.

6. Make copy come to a climax.

   - Ask for the order.
   - Ask for some action on the part of the customer.

829

RADIO SPOT ANNOUNCEMENT

:30 "I Hate Bugs"

Client: Therminix, Inc.
Medium: Radio
Date:
Job Number:

I hate bugs. I hate ants, roaches, ticks, fleas. I hate termites, beetles, mice. I hate every kind of creepy, crawly pest you can name and I'm the best in the pest control business. 27-years, top man with Therminix. Top man, and what do I get? A big plastic bug on top of my truck. It's embarrassing. If you hate pests, call Therminix. We're in the yellow pages and drive the red trucks with the big bug on top.

Bill Smith and Associates
Corning Square, Suite B, Fernand, OK 74201

830

TIPS ON DEALING WITH THE MEDIA

- Be professional, maintain good contacts with local media.
- Any news releases should look neat and be free of any grammatical errors.
- Photographs should accompany news releases if applicable.
- Don't expect every news release or event at your business to be published
- Complete a written agreement with the local media for all advertising.
- Do **not** run any advertisements that have errors in them. Proofread all ads before publication.
- Talk with the local media about how they prefer the advertisements for their media.✓
- Turn in ads in plenty of time for them to meet the deadline.
- Review the printed copy of each ad.

Logotypes

DRYSDALES®

COOPER LIVESTOCK
MARKETING AGENTS

GARDNEER

Gro group®
Distributor

OKLAHOMA SHEEP & WOOL PRODUCERS ASSOC.

BLUE RIDGE FARMS

Greenleaf
Nursery Co.

humpty
supermarkets.

TENER'S
[illegible]

[illegible]

HOMELAND

Justin

Justin Ropers®

JOHN DEERE

case IH

Wrangler

Cowboy Cut® Jeans

TRANSPARENCY MASTER 1 - Sales and Service
XI - 35

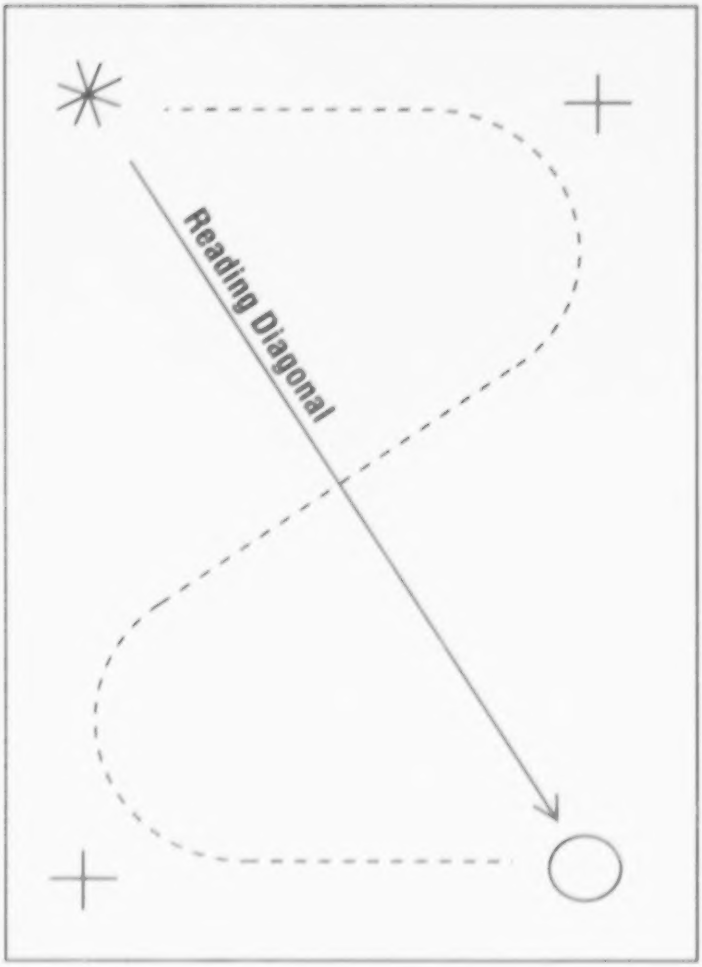
TM 1

Shopping Events

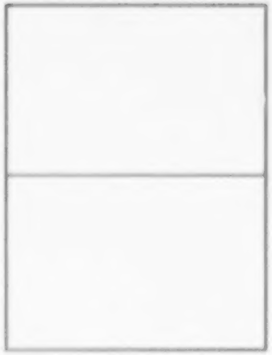
MONTH	CALENDAR EVENTS	PROMOTIONS
January	Inventory clearance	Clearance of winter merchandise Resort wear
February	Lincoln's Birthday; Washington's Birthday; Valentine's Day; FFA Week; Lent*	Advance showing of spring merchandise; Weed treatments
March	Girl Scout Week; Easter*; St. Patrick's Day	Spring clothes; Boating and camping shows
April	Opening of baseball season	Spring cleaning supplies; Garden supplies-bedding plants and outdoor furniture
May	Mother's Day	Spring clearance; Summer ; sportswear: Air conditioners
June	Graduation: Father's Day	Summer wear; Barbecue needs
July	Fourth of July: Inventory clearance	Summer clearance
August	Back-to-school needs; Fairs	Advance showing of fall merchandise
September	Christmas layaway promotion; Back-to-school	Fall clothes; Heaters; Insulation Storm windows and doors
October	Columbus Day; Halloween	Fall clothes and accessories
November	Election Day; Thanksgiving; Christmas	Winter clothes and accessories; Gift items; Decorations and trees
December	Christmas	Winter clothes; Resort wear; Gift items; Cold weather supplies
*May Vary		

834

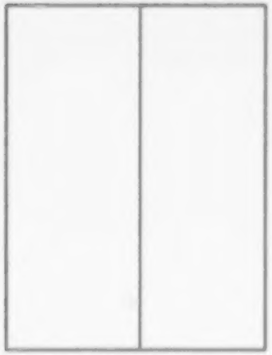
Reading Diagonal


Reading Diagonal

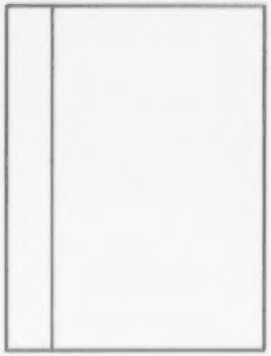
Proportion



The area is divided into two equal parts by a horizontal line. The line may be a drawn border or white space.

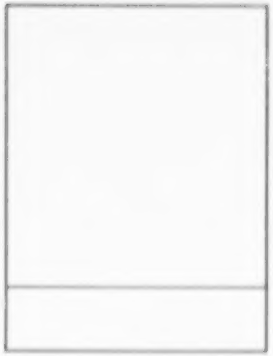


The area is divided into two equal vertical parts. Often the illustration is on one half and the other elements are on the other half.

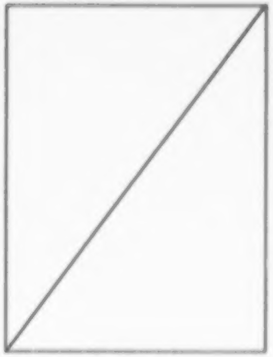


The ad is divided by about 1/5 and 4/5. This is used when related items go with a major item featured.

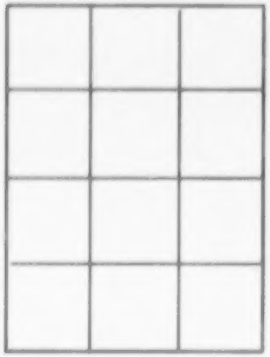
Proportion
(Continued)



A horizontal line at either top or bottom makes a division of about 1/4 and 3/4. A bottom division is usually preferred.

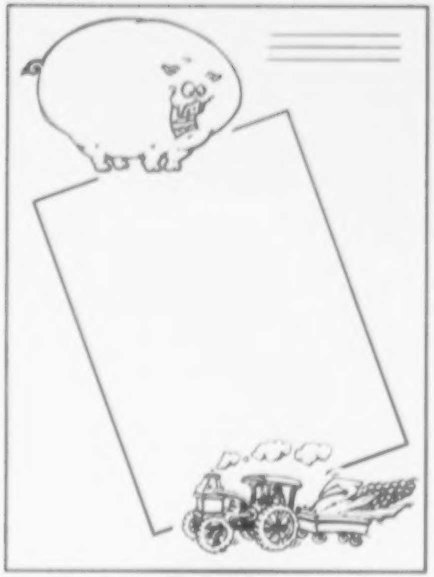


A diagonal line divides the space into halves. This is used when illustrations are tall.



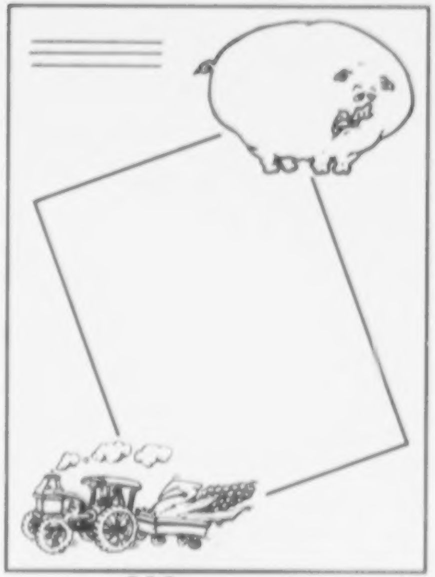
Several vertical and horizontal lines are drawn to make 6, 8, 12, or more areas.

Illustrations Direct Attention to the Message



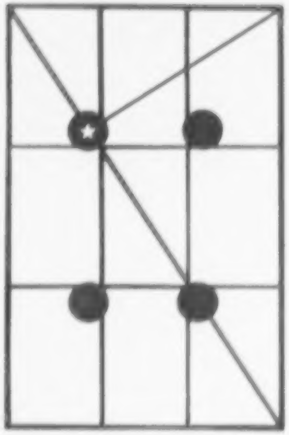
Right

Illustrations and Action Statements Should Lead the Eye Into the Ad ...... Not Out

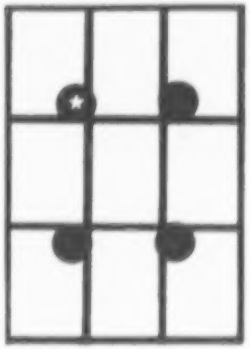


Wrong

Focal Points



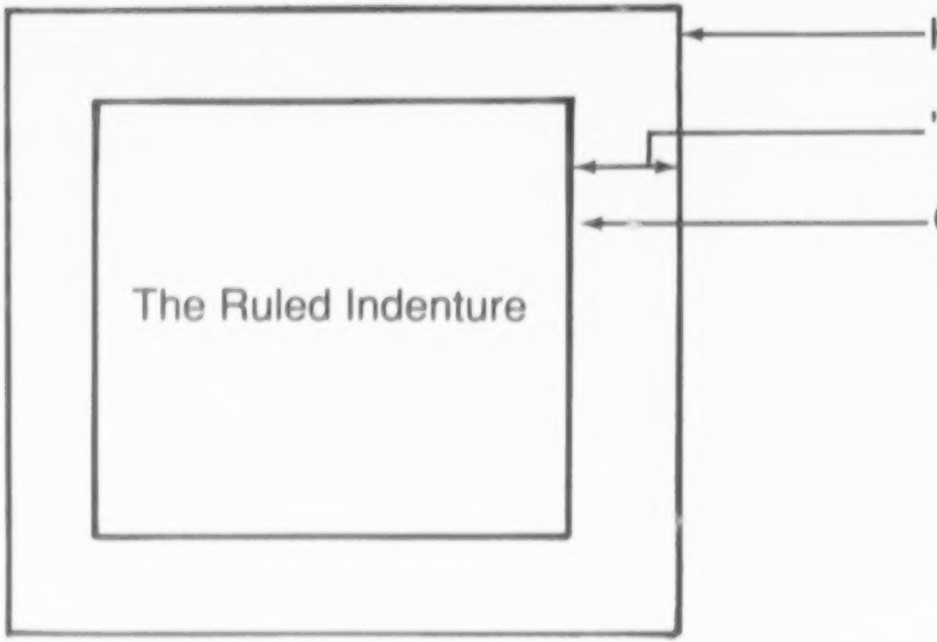
Point ✪: Marks the Prime Focal Interest.
Others are Secondary in Visual Appeal.



Divide Sides Into Thirds
. . . For Quick Approximate Position

White Space

Hints That Help in Assuring "White Space"



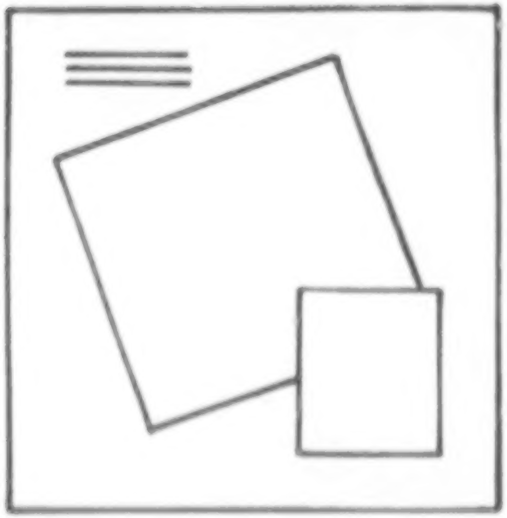
Hairline or "Column" Rule

"Indented" Space

Outer "Border" of Ad

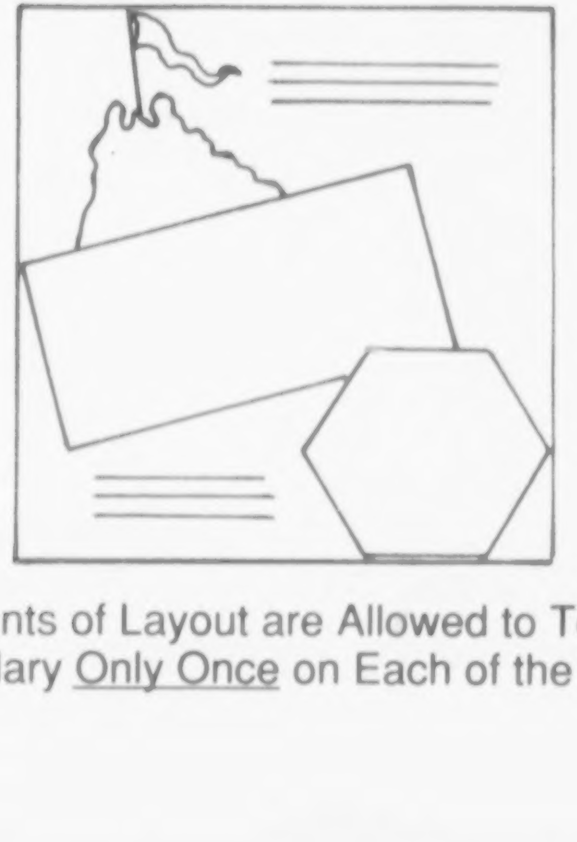
The Ruled Indenture

Panel Forms



Use Simple Panel Forms to Assure White Space

Four-Point Principle



. . . Elements of Layout are Allowed to Touch the Boundary Only Once on Each of the Four Sides

ASSIGNMENT SHEET 1

ADVERTISING

NAME ________________________ SCORE ______

OBJECTIVE 18 **Analyze newspaper advertisements.**

INTRODUCTION Advertisements should be checked for completeness, accuracy, and production quality. By checking each ad, problems may be detected and corrected before the ad is run. A simple check list may be used to analyze the completeness, accuracy, production quality, and overall effectiveness of an advertisement.

DIRECTIONS Look through copies of newspapers and find two advertisements which deal with similar products/services and which were run by different sponsors. Then complete the checklist and answer the questions about the advertisements.

Part I

Paste ads to separate sheets of paper.

NOTE: The ads should be similar in size and by similar companies. Ads should be at least four inches by six inches.

Part II

Identify the elements of the advertisements.

- Headline
- White space and border
- Subheading
- Illustration
- Copy
- Logo/signature cut

Part III

Complete a newspaper checklist for each ad.

NEWSPAPER ADVERTISEMENT CHECKLIST

Ad's Sponsor

Ad 1. ______________________________

Ad 2. ______________________________

Does the ad present a central theme, idea or philosophy?

1. ______________________________
2. ______________________________

Does the ad contain an attention-getting headline?

1. ______________________________
2. ______________________________

Does the illustration effectively show the merchandise or service?

1. ______________________________
2. ______________________________

Does the body copy present a customer-oriented point of view?

1. ______________________________
2. ______________________________

Does the ad appropriately use store logo and information?

1. ______________________________
2. ______________________________

Does the ad effectively use all elements together in harmony?

1. ______________________________
2. ______________________________

Is there a defined sequence which the customer's eyes will follow?

1. ______________________________
2. ______________________________

Does the ad ask the customer for action, to come in and buy?

1. ____________________

2. ____________________

Part IV

Analyze newspaper advertisements.

1. Which of the two advertisements was the more effective overall? Explain your answer.

2. What was the strongest element of each ad? The weakest? Explain your answer.

852

Part V

Make recommendations to improve newspaper advertisements.

Write your recommendations for improving each of the advertisements you selected for this assignment.

1. Advertisement #1, Sponsor's name

2. Advertisement #2, Sponsor's name

ASSIGNMENT SHEET 2

ADVERTISING

XI

NAME ______________________________ SCORE ________

OBJECTIVE 19

Analyze radio announcements.

INTRODUCTION

Advertisements must be checked for completeness, accuracy, and production quality. By checking each ad, problems may be detected and corrected before the ad is run. A simple checklist may be used to analyze the completeness, accuracy, production quality, and overall effectiveness of an advertisement.

DIRECTIONS

In this assignment, you are given several questions for analyzing radio advertisements. Listen to two taped radio advertisements which deal with similar products or services and which were run by different sponsors. Then answer the questions provided to analyze the radio advertisements.

Part I

Describe each ad

1. Radio ad #1
   a. Sponsor ______________________________
   b. Product or service being advertised ____________________
   c. Length of commercial ______________________________
   d. Describe the ad in detail ______________________________

____

____

____

____

____

____

____

____

2. Radio ad #2.

   a. Sponsor______________________________

   b. Product or service being advertised________________

   c. Length of commercial ____________________

   d. Describe the ad in detail. ____________________

Part II

Complete the following checklists for radio advertisements.

RADIO ADVERTISEMENT CHECKLIST

Ad's Sponsor ______________________________

Ad 1. ______________________________

Ad 2. ______________________________

Length of ad:

1. ______________________________
2. ______________________________

Does ad present a central theme, idea or philosophy?

1. ______________________________
2. ______________________________

Does the ad present the product or service from the customer's point of view?

1. ______________________________
2. ______________________________

Does the content of the ad flow from beginning to end?

1. ______________________________
2. ______________________________

Can the customer effectively determine the nature of the product or service?

1. ______________________________
2. ______________________________

Does the ad provide store location and other information?

1. ______________________________
2. ______________________________

Is the station and time frame used appropriate for the market?

1. ______________________________
2. ______________________________

Are voices easy to understand?

1. ______________________________
2. ______________________________

Are the voices appropriate?

1. ______________________________
2. ______________________________

Are appropriate sound effects used?

1. ______________________________
2. ______________________________

Does the ad use maximum efficiency of air time? (Out of a 30-second commercial, 28 seconds should contain sound.)

1. ______________________________
2. ______________________________

Does the ad ask the customer for action, to come in and buy?

1. ______________________________
2. ______________________________

Part III

1. Which of the two advertisements was the more effective overall? Explain your answer.

2. What was the strongest feature of each ad? The weakest? Explain your answers.

Part IV

Make recommendations to improve radio advertisements.

Write your recommendations for improving each of the radio advertisements that were chosen for this assignment.

1. Advertisement #1 - Sponsor's name

2. Advertisement #2 - Sponsor's name

ASSIGNMENT SHEET 3

ADVERTISING

XI

NAME ______________________________ SCORE ________

OBJECTIVE 20 **Utilize product information to design a newspaper ad.**

DIRECTIONS

Make a rough draft of an ad layout on a separate sheet of paper. You may either

1. Advertise your business and your products or services, or
2. Your instructor will assist you in selecting appropriate products or services to advertise.

You may combine several products in one ad if desired. You may also use products and illustrations cut from newspapers or magazines.

Write your own copy for the product or services you choose. Remember to include the major parts of an ad as discussed Objective 8.

ASSIGNMENT SHEET 4

ADVERTISING

XI

NAME ______________________________ SCORE _______

OBJECTIVE 21

Utilize product information to prepare a news release.

INTRODUCTION

The primary purpose of a publicity release is to inform the public about an event, activity, or personnel action that has taken place or is about to take place within the business. Publicity releases generally are given to newspaper companies for print. Radio and television stations may also be given publicity releases.

NOTE: When a radio or television station runs an announcement for a non-profit organization, such as FFA, that air time is called public service time and the release is called a public service announcement. The Federal Communications Commission requires all radio and television stations to provide a certain amount of public service time.

DIRECTIONS

In this assignment you are to write a publicity release which could be sent to your local newspaper to announce one of the following:

- The grand opening of your new store or service business
- The introduction of a new product of special interest to farms
- An upcoming FFA event

You will have to create the store name, product information, etc., needed in the release. Follow the format outlined in Supplement 1.

ASSIGNMENT SHEET 5

ADVERTISING

NAME ______________________________ SCORE _______

OBJECTIVE 22

Utilize product information to prepare a radio spot announcement.

DIRECTIONS

In this assignment you are to write a radio advertisement which could be sent to your local radio station. The advertisement should cover one of the of the following:

- The grand opening of your new store or service business
- The introduction of a new product/service of special interest to farmers
- An upcoming FFA event

You may create the store name, product/service information, etc., needed in the announcement. Follow the format outlined in Supplement 2.

ASSIGNMENT ANSWERS

ADVERTISING

XI

ASSIGNMENT SHEET 1	Insure that student has completed the checklist and all parts of the Assignment Sheet.
ASSIGNMENT SHEET 2	Insure that student has completed the checklist and all parts of the Assignment Sheet.
ASSIGNMENT SHEET 3	Insure that rough draft includes the major parts of an ad layout as discussed in Objective 8.
ASSIGNMENT SHEET 4	Insure that student followed the outline in Supplement 1.
ASSIGNMENT SHEET 5	Insure that student followed the outline in Supplement 2.

WRITTEN TEST | **ADVERTISING**

XI

NAME ______________________________ SCORE _______

OBJECTIVE 1

Match terms associated with advertising to their correct definitions. Write the correct letters in the blanks.

____ 1. A message, paid for by a sponsor, which informs people about a company and its services

____ 2. System of advertising in which the manufacturer and the local business share in the cost of delivering their message

____ 3. Advertising used primarily to build customer goodwill and to present the store as a good place to shop

____ 4. Intangible, salable asset representing the reputation of a business and its relationship with its customers

____ 5. Newspaper which contains many advertisements by local businesses and is provided free of charge to local residents

____ 6. System for delivering an advertised message

____ 7. Company or individual who pays for an advertisement

____ 8. Merchandise sold at a reduced price or even at a loss in order to attract customers into the business

____ 9. Cost of a single line of newspaper space per each million people reached by the newspaper circulation

____ 10. Method of measuring and paying for some newspaper ads

____ 11. Advertising which mainly attempts to sell specific merchandise

a. Goodwill
b. Column inch
c. Leader
d. Loser
e. Regional advertising
f. Media hype
g. Omnibus advertising
h. Publication
i. Buyer
j. Logo/signature cut
k. Cooperative advertising
l. Promotional advertising
m. Free paper
n. Proof
o. Media
p. Staggered advertising
q. Sponsor
r. Milline rate
s. Brand name
t. Shopper
u. Focal point
v. Classified advertising

___12. Presentation of facts which may be free and may not have an identified sponsor

___13. Advertisement that may be placed anywhere in the newspaper as opposed to specifying a particular section of the newspaper or position of the ad on page

___14. Radio or television commercial that ranges from 10 to 60 seconds in length; usually purchased as a package of 10, 20, or 30 advertisements

___15. Time when the largest number of people listen to the radio or watch television

___16. Business which conducts market advertising campaigns for firms and companies

___17. Arrangement of copy and illustrations on the printed page

___18. Name or symbol of the store or company

___19. Book supplied by printing shops and newspapers from which advertisers may select illustrations of all types, sizes and brand names

___20. Advertisement that contains a variety of unrelated items

___21. Copy of an advertisement which is given to the advertiser to be checked for errors before being printed

___22. Spot within a rectangle where the eye naturally pauses

___23. Style of letters

___24. The main body or text of an advertisement

w. Consulting firm

x. Type face

y. Advertisement

z. Institutional advertising

aa. Spot announcement

bb. Publicity

cc. TV/radio

dd. Marketing research

ee. Layout

ff. Prime time

gg. R.O.P. (Run of Paper)

hh. Proof book

ii. Slick book

jj. Advertising agency

kk. Copy

OBJECTIVE 2 **Discuss the functions of advertisements.**

OBJECTIVE 3 **State the advantages and disadvantages of advertising.**

OBJECTIVE 4 **List the advantages and disadvantages of various major advertising media.** List one advantage and one disadvantage for each of the media given.

Media	**Advantage**	**Disadvantage**
Newspaper		
Magazine		
Direct Mail		
Radio		
Television		

OBJECTIVE 5

Select from a list the kinds of merchandise to advertise. Write an "X" in the blank before each correct answer.

____ 1. Best sellers

____ 2. Slow moving merchandise

____ 3. New items and styles

____ 4. Out-of-season merchandise

____ 5. Traffic builders

____ 6. Reduced items

____ 7. Discontinued merchandise

OBJECTIVE 6

Name the factors that determine when to advertise.

____

____

____

____

____

OBJECTIVE 7

Name the factors to consider in selecting advertising media. Write three factors in the space provided.

____

____

____

____

____

____

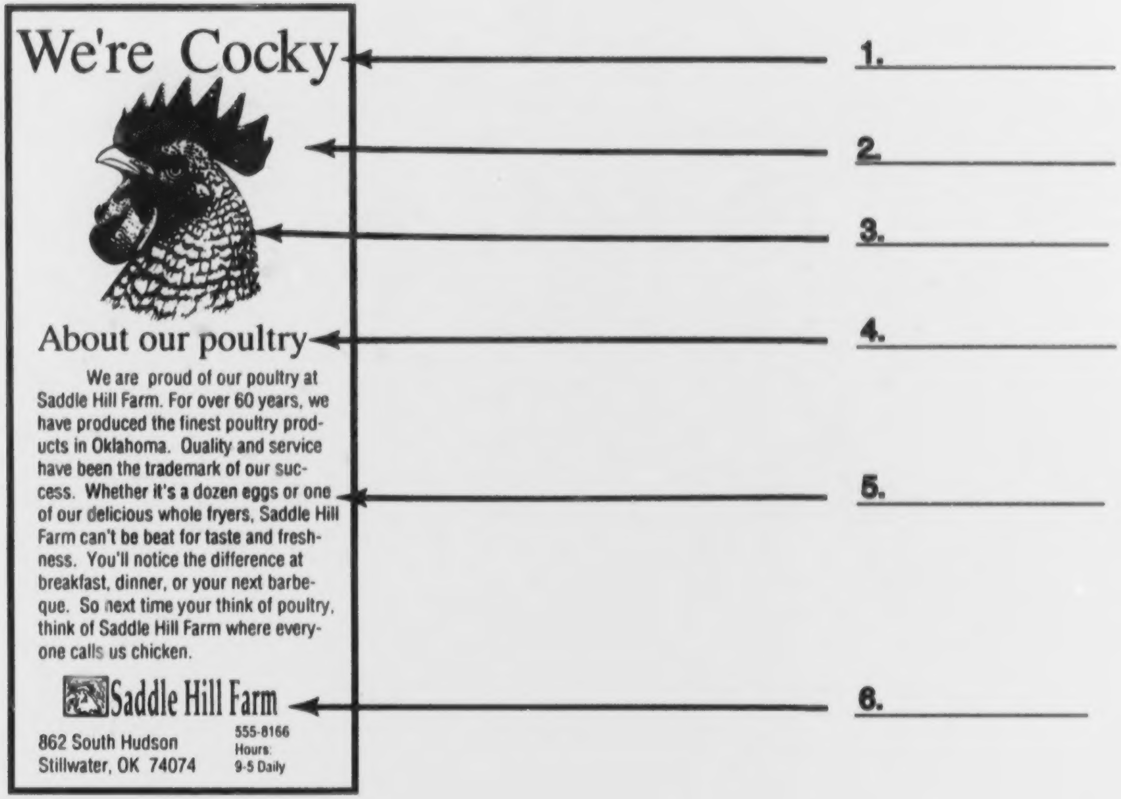
____

____

____

Major Parts of an Advertising Layout

OBJECTIVE 8 | Label the major parts of an advertising layout.



We are proud of our poultry at Saddle Hill Farm. For over 60 years, we have produced the finest poultry products in Oklahoma. Quality and service have been the trademark of our success. Whether it's a dozen eggs or one of our delicious whole fryers, Saddle Hill Farm can't be beat for taste and freshness. You'll notice the difference at breakfast, dinner, or your next barbeque. So next time your think of poultry, think of Saddle Hill Farm where everyone calls us chicken.

862 South Hudson
Stillwater, OK 74074

555-8166
Hours:
9-5 Daily

1. ______________
2. ______________
3. ______________
4. ______________
5. ______________
6. ______________

OBJECTIVE 9

Select from a list true statements about the characteristics of good advertising layout. Write an "X" in the blank before each true statement.

____ 1. Should direct the eye smoothly from the top of the ad, through the center, to the bottom of the ad.

____ 2. Should direct the eye from the center of the ad to each corner.

____ 3. Often follows the shapes of letters of the alphabet.

____ 4. Should keep each element in the ad in proportion and harmony with the other elements.

____ 5. May use attention-getters.

____ 6. Should go with the idea that the eye naturally moves in a northeasterly sweep.

____ 7. Should not use attention-getters because they distract attention from the message.

OBJECTIVE 10

Select from a list true statements about the characteristics of a good headline. Write an "X" in the blank before each correct answer.

____ 1. Catches prospective customer's attention.

____ 2. Stresses "I," "me," "my."

____ 3. Arouses curiosity.

____ 4. Is timely.

____ 5. Leads prospective customers to read the rest of the ad.

____ 6. Does not need to indicate the content of the ad.

____ 7. Stresses customer benefits.

____ 8. Appeals to customer's buying motives.

____ 9. Is always honest.

____ 10. Is easy to read.

____ 11. Is written in straight lines with the words reading from left to right.

____ 12. Includes complete punctuation.

____ 13. Does not need to relate headline to illustration.

____ 14. Uses white letters on a black background quite frequently.

___ 15. Uses several headlines in an ad.

OBJECTIVE 11

Select from a list purposes of subheadings. Write an "X" in the blank before each correct answer.

____ 1. Is written in low key language so it doesn't distract from the headline.

____ 2. Breaks monotony and adds excitement.

____ 3. Helps the reader read the ad from top to bottom.

____ 4. Explains the headline further.

____ 5. Gives clues to the main points covered in each block of copy.

____ 6. Helps the reader choose those parts of the ad in which he or she is most interested.

____ 7. Does not help sales.

OBJECTIVE 12

Select from a list true statements about the characteristics of good copy. Write an "X" in the blank before each true statement.

____ 1. Gives the reason for buying the product and is based on buying motives and customer benefits.

____ 2. Gives the reason for shopping in the store.

____ 3. Urges the reader to buy when it is convenient.

____ 4. Uses many common cliches.

____ 5. Uses many abbreviations to conserve space.

____ 6. Uses specific descriptions.

____ 7. Includes important store information.

____ 8. Sounds enthusiastic.

____ 9. Is informative and believable.

___ 10. Sounds serious and formal.

___ 11. Uses many different kinds of typefaces.

___ 12. Uses mostly incomplete sentences.

___ 13. May begin with bold letters.

OBJECTIVE 13 **Select from a list true statements about illustrations.** Write an "X" in the blank before each true statement.

____ 1. Presents merchandise effectively.

____ 2. Guides reader's attention to the advertising message.

____ 3. Should have all related items priced.

____ 4. Should not mention prices in ad.

____ 5. May not take attention away from other parts of the ad.

____ 6. May be the dominant attention-getter for the ad.

____ 7. Illustration does not have to relate to the ad in any way.

OBJECTIVE 14 **List ways to assure wise use of white space in an ad.**

____

____

____

____

OBJECTIVE 15 **Name factors to remember when selecting color for an ad.**

____

____

OBJECTIVE 16 **Define terms describing the stages of an ad layout.**

Rough draft ____________________

____

____

Thumbnail sketch ____________________

____

____

Comprehensive (semi-comprehensive or semi-comp) ____________

____

____

OBJECTIVE 17 **Name additional forms of advertising media.** Write the name of five other forms of advertising media in the space provided.

____

____

____

____

____

NOTICE The following assignment sheets are not part of the written test. If these activities have not been completed, check with your instructor.

OBJECTIVE 18 **Analyze newspaper advertisements.** SCORE ________

OBJECTIVE 19 **Analyze radio announcements.** SCORE ________

OBJECTIVE 20 **Utilize product information to design a newspaper ad.** SCORE ________

OBJECTIVE 21 **Utilize product information to prepare a news release.** SCORE ________

OBJECTIVE 22 **Utilize product information to prepare a radio spot announcement.** SCORE ________

WRITTEN TEST ANSWERS

ADVERTISING

XI

OBJECTIVE 1

1. y
2. k
3. z
4. a
5. t
6. o
7. q
8. c
9. r
10. b
11. l
12. bb
13. gg
14. aa
15. ff
16. jj
17. ee
18. j
19. ii
20. g
21. n
22. u
23. x
24. kk

OBJECTIVE 2

Answer should include the following:

- Attract the attention of the consumer.
- Inform them about your product, service, company or idea.
- Convince them to purchase your product or service or have a feeling of goodwill toward the company.

OBJECTIVE 3

Answer should include the following:

Advantages

- It quickly gains attention.
- It reaches individuals at a much lower cost per contact as compared to personal selling.
- The content of advertising can be controlled by the selling company.

Disadvantages

- It is non-personal in nature and is less compelling than any personal contact by a salesperson.
- It cannot answer all the questions of a potential customer.

OBJECTIVE 4

Answers should include one advantage and one disadvantage for each of the media given.

OBJECTIVE 5

1, 3, 5, 6

OBJECTIVE 6

- Heavy promotional periods
- Day of the week that is best for the type store, product, and customers

OBJECTIVE 7

Answer should include any three of the following:

- What is the market coverage of the medium?
- What type of audience does the medium appeal to?
- What types of business advertising is the medium particularly suited for?
- What are the advantages of the medium?
- What are the disadvantages of the medium?

OBJECTIVE 8

1. Headline
2. White space and border
3. Illustration
4. Subheading
5. Copy
6. Logo/signature cut

OBJECTIVE 9

1, 3, 4, 5

OBJECTIVE 10	1, 3, 4, 5, 7, 8, 9, 10
OBJECTIVE 11	2, 4, 5, 6
OBJECTIVE 12	1, 2, 6, 7, 8, 9, 13
OBJECTIVE 13	1, 2, 3, 6
OBJECTIVE 14	• Indent from the thin column border before beginning the ad's border. • Use simple panel forms to help group information. • Allow elements of the layout to touch the boundary only once on each of the four sides.
OBJECTIVE 15	• Use color only if it dramatizes the merchandise and increases sales enough to justify the additional cost. • Use only the purest and brightest colors.
OBJECTIVE 16	**Thumbnail sketch**—Small outline with a few lines and shapes to show the placement of the headline, copy, illustration, and logo. **Rough draft**—Best thumbnail sketches enlarged and drawn a number of times until all the elements are the exact size and position. **Comprehensive (sometimes called "semi-comprehensive" or "semi-comp")**—Traced from the rough layout with enough detail added to show how the finished advertisement will look.
OBJECTIVE 17	Answers may include: • Shopping news • Car-card advertising • Outdoor advertising • Directory advertising • Program advertising

- Specialty advertising
- Handbills
- Table tent

OBJECTIVE 18 Refer to answers to Assignment Sheet 1.

OBJECTIVE 19 Refer to answers to Assignment Sheet 2.

OBJECTIVE 20 Refer to answers to Assignment Sheet 3.

OBJECTIVE 21 Refer to answers to Assignment Sheet 4.

OBJECTIVE 22 Refer to answers to Assignment Sheet 5.

OBJECTIVE SHEET

FREE ENTERPRISE, GOVERNMENT, AND THE AMERICAN MARKET

XII

INTRODUCTION

The National Resources Committee defined the American economy in this way: The American economy is the organized activity through which the people of this country obtain their living. Farmers raising food and fiber, miners extracting ore and coal, industrial workers fabricating raw materials into finished products, wholesale and retail distributors making goods available to consumers, and a host of workers performing the other countless tasks required by modern living, all of these are combined in a huge and highly complex producing organization which constitutes the national economy. Through this complex organization, the nation's resources of manpower and materials are used to satisfy human wants.

UNIT OBJECTIVE

After completing this unit, the student should be able to explain how the free enterprise system works and discuss the roles of government, individuals and business in the economy. The student should also be able to discuss various business organizations and how they function and apply economic principles to a business situation. The student will demonstrate these competencies by completing the assignment sheets and written test with a minimum of 85 percent accuracy.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to

1. Match terms associated with free enterprise, government, business organizations, and the American market to their correct definitions.
2. Match components of an economic system to their correct descriptions.
3. List the functions of an economic system.
4. Match the economic goals of the American people to their correct descriptions.
5. Discuss the characteristics of a free enterprise economy.
6. Discuss the roles of government, individuals and businesses in the economy.
7. Select from a list facts about consumers in a free enterprise economy.
8. Discuss the function of supply and demand.

9. List ways in which price is determined in a free enterprise economy.
10. Select from a list ways in which price influences flows in a free enterprise system.
11. List the benefits of competition and profit.
12. List areas of government involvement in the marketplace.
13. List reasons the government's role increased.
14. Discuss problems with government involvement.
15. Discuss the criteria for government involvement in the marketplace.
16. Select from a list the reasons for striving to reach economic goals.
17. Distinguish among the ways the federal government influences the economy through the Federal Reserve bank's policies and through fiscal policy.
18. Distinguish among types of business organizations.
19. Distinguish among types of cooperative corporations and their characteristics.
20. Distinguish among characteristics of various organizational patterns.
21. Analyze characteristics of a free enterprise economy. (Assignment Sheet 1)
22. Apply economic principles to agribusiness situations. (Assignment Sheet 2)
23. Collect information on the role of government in a free enterprise economy. (Assignment Sheet 3)
24. Complete a business structure worksheet. (Assignment Sheet 4)

SUGGESTED ACTIVITIES

FREE ENTERPRISE, GOVERNMENT, AND THE AMERICAN MARKET

XII

PREPARATION

- Obtain materials to supplement unit.

  NOTE: See suggested resources.

- Review instructional outline for this unit. Modify time frames to suit class needs and plan activities for each class period.
- Study the specific objectives to determine those you will cover in your presentation. Decide also which objectives should be taught to which students.
- Determine scope and sequence of objectives that you add. Design and develop support materials, including evaluation techniques, for additional objectives.
- Determine how you will schedule time for students to demonstrate competence in the required procedures.
- Make arrangements for guest speakers. Supply speakers with specific objectives and other appropriate sections of the unit.
- Prepare classroom.
  - Put up posters, charts, etc. dealing with free enterprise and economics.
  - Have articles, brochures, and other items dealing with economics and free enterprise available for students.

DELIVERY

Objective 1

- Discuss terms associated with the free enterprise system.
- Use a bulletin-board display with magazine and newspaper reports on the economy and economic indicators.

  NOTE: The National federation of Independent Business prints a poster entitled "What's the Difference?" that compares the standards of living in Washington, D.C., London, England, and Moscow, U.S.S.R. Copies are available free of charge to teachers ordering on school stationery. Write to the National Federation of Independent Business, 150 West 20th Avenue, San Mateo, California 94403.

- Invite an agribusiness owner/manager to discuss how his or her business is affected by free enterprise.

Objectives 2 and 3

- Discuss the essential components and functions of the free enterprise economy.

Objectives 4 and 5

- Discuss the economic goals of the American people and the characteristics of a free enterprise economy. Discuss the relationship between the two.

- Have the class discuss the importance of these goals to their own lives.

- Have students complete Assignment Sheet 1, "Analyze Characteristics of a Free enterprise Economy," to reinforce your discussion.

- Lead a group discussion to explore the history of a product with which the students are familiar to see how competition lowers prices and introduces improvements.

  EXAMPLES: Personal computers, VCR's, telephones, stereos, etc.

- Have individuals or groups report on the economic opportunities or lack of opportunities under other government systems.

- Have students complete Assignment Sheet 2, "Applying Economic Principles to Agribusiness Situations" to reinforce your previous discussions.

Objective 6

- Discuss the roles of government, individuals and businesses in the economy.

- Use Transparency Master 1.

- Have students complete Assignment Sheet 3 and be prepared to share their findings with the main group.

- Have students report their findings to the Assignment Sheet 3 exercise to the main group/class. Explore the opportunities and implications coming from these reports.

Objective 7

- Discuss the roles of the consumer within the free enterprise functions of allocation, flow maintenance and coordination.
- Provide the students with stories about successful entrepreneurs, especially those in agribusiness.

  EXAMPLE: William H. Danforth, founder of the Ralston Purina Company
- Have class discuss their own roles as consumers.
- Discuss how producers have responded to consumer's desires and needs with new and/or improved goods and services and how these have influenced our lifestyles. Start by having the students think of all the products that have recently come on the market and were not available during their parent's or grandparent's early years. List their suggestions on the chalkboard.

  EXAMPLES: *Paper products*: diapers, napkins, tissues,plates, table covers, etc.

  Disposable products: Syringes, razors, lighters, etc.

  Services: Babysitting, housecleaning, child care centers

Objectives 8 through 10

- Discuss the function of supply and demand and the ways in which price is determined in a free enterprise economy. Also discuss how price influences flow in the free enterprise system.
- Relate the concepts of supply and demand to the real concerns of your students, such as buying a car, living on their own, and the costs of clothing or dating.
- Lead the class in a discussion of how price enters into their own buying decisions.
- Have the students contact various agribusinesses to compare prices on like items and services.

Objective 11

- Discuss the benefits of competition and profit.

- Invite an agribusiness person to discuss the impact competition has had on his or her business or industry. Also discuss how competition and/or profits have stimulated the development of new products, services, or ways of doing business.

- Have students generate a list of changes they have seen take place in agribusiness due to competition or the need to improve profits.

Objectives 12 through 15

- Discuss the government's involvement in the market, why its role has increased, some of the problems it creates and the criteria for government involvement in the market.

- Invite an agribusiness person to discuss the changes he or she has observed associated with the government's involvement in the market.

Objective 16

- Review Information Sheet and discuss why it is important for us to strive to reach economic goals.

- Provide students with both positive and negative examples of economic goals.

Objective 17

- Review the Information Sheet and discuss how the government influences the economy. Use Transparency Master 2.

- Invite a banker and/or agribusiness person to discuss these topics with the class and relate how the government's fiscal policy and the Federal Reserve's policies/actions impact on agribusiness.

Objective 18

- Review the Information Sheet and provide examples of each type of business organization.

- Have a tax accountant or attorney share with the group the advantages inherent in each type of organization. Also, discuss when each type is appropriate.

- Have students complete Assignment Sheet 4, "Complete A Business Organization Worksheet" using the information in Supplement 1.

Objective 19

- Survey the class to find out their perceptions and knowledge of cooperatives. Also determine the type of experience they have had with cooperatives.
- Review the Information Sheet.
- Have students develop a list of the various products and services cooperatives have been formed to provide.
- Invite a cooperative manager(s) to discuss the types, purposes and benefits associated with cooperatives. Also discuss their organizational structure and characteristics.
- Have students make a 3 to 5 minute presentation on a cooperative they are interested in.

Objective 20

- Use the Information Sheet and Transparency Masters 3, 4, and 5 to discuss organizational patterns.
- Survey businesses in the area to determine the types of organizational patterns being used.
- Divide students into several small groups with each group representing a type of agribusiness. Then, have them select an organizational pattern and outline what their agribusiness will offer. Also, they are to explain why they selected a particular organizational pattern.

APPLICATION

Objective 21

- Use Assignment Sheet 1 to give students practice in analyzing the characteristics of a free enterprise economy.

Objective 22

- Use Assignment Sheet 2 to give students practice in applying economic principles to agribusiness situations.

882

Objective 23

- Use Assignment Sheet 3 to give students practice in collecting information on the role of government in a free enterprise economy.

Objective 24

- Use Assignment Sheet 4 to give students practice in completing a business organization worksheet.

EVALUATION

Written Test

- Explain to students that they will be asked to demonstrate on the written test actions listed in the specific objectives.
- Give written test.

  NOTE: The written test may be given in sections if desired.
- Evaluate students on assignment sheet activities, if not previously done.
- Reteach and retest if necessary.
- Complete appropriate section of competency profiles.
- Review individual and group performance in order to evaluate teaching methods. Adjust scope, sequence, or instructional approaches for additional lessons as required.

SUGGESTED RESOURCES

Publications

- Obtain literature or other material on economics, the free enterprise system and business organizations.

UNIT REFERENCES

- *Distributive Education II*, Curriculum and Instructional Materials Center, Oklahoma Department of Vocational and Technical Education, Stillwater, Oklahoma, 1976.
- *Employment in Agribusiness*, Mid-America Vocational Curriculum Consortium, Stillwater, Oklahoma, 1984.
- *Fundamental of Concrete and Cement Masonry*, Associated General Contractors, Stillwater, Oklahoma, 1987.

BASIC SKILLS

The following table identifies the basic academic skills that are reinforced in this unit of instruction. These basic academic skills were identified using *The Basic/Essential Skills Taxonomy*, second edition and verified during the validation process.

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 1	Free Enterprise 006	Defines	Economic terms	
	Free Enterprise 020	Defines	Economic terms	Economics
	Free Enterprise 044	Defines	Economic terms	Profit
OBJECTIVE 2	Free Enterprise 006	Defines	Economic terms	
	Free Enterprise 014	Defines	Economic terms	Consumer
	Free Enterprise 053	Defines	Economic terms	Services
	Free Enterprise 026	Defines	Economic terms	Goods
	Free Enterprise 049	Defines	Economic terms	Resources
OBJECTIVE 3	Free Enterprise 065	Describes/ Explains	Economic concepts	
OBJECTIVE 4	Free Enterprise 020	Defines	Economic terms	Economic terms

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 5	Free Enterprise 006	Defines	Economic terms	
	Free Enterprise 013	Defines	Economic terms	Competition
	Free Enterprise 045	Defines	Economic terms	Profit motive
	Free Enterprise 046	Defines	Economic terms	Property
	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
OBJECTIVE 6	Free Enterprise 074	Describes/ Explains	Economic interdependence	
	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
OBJECTIVE 7	Language Arts 139	Comprehends	Information-	Context written
	Language Arts 191	Evaluates	Information-	Validity written
OBJECTIVE 8	Free Enterprise 072	Describes/ Explains	Economic concepts	Supply/ demand
	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
OBJECTIVE 9	Free Enterprise 072	Describes/ Explains	Economic concepts	Supply/ demand

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 10	Language Arts 191	Evaluates	Information-	Validity written
	Free Enterprise 041	Defines	Economic terms	Price
OBJECTIVE 11	Free Enterprise 115	Describes/ Explains	Needs/wants	Goods/ services
OBJECTIVE 12	Free Enterprise 087	Describes/ Explains	Government impact/costs	
OBJECTIVE 13	Free Enterprise 087	Describes/ Explains	Government impact/costs	
OBJECTIVE 14	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
	Free Enterprise 087	Describes/ Explains	Government impact/costs	
OBJECTIVE 15	Free Enterprise 087	Describes/ Explains	Government impact/costs	
OBJECTIVE 16	Language Arts 191	Evaluates	Information-	Validity written
OBJECTIVE 17	Free Enterprise 006	Defines	Economic terms	
	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 18	Language Arts 013	Applies/Uses	Definitions	
	Free Enterprise 006	Defines	Economic terms	

886

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 19	Language Arts 013	Applies/Uses	Definitions	
	Free Enterprise 006	Defines	Economic terms	
OBJECTIVE 20	Language Arts 013	Applies/Uses	Definitions	
	Free Enterprise 006	Defines	Economic terms	
OBJECTIVE 21	Language Arts 035	Attends	Directions/ Task	
	Language Arts 139	Comprehends	Information-written	Context
	Language Arts 180	Evaluates	Information-written	
	Language Arts 188	Evaluates	Information-written	Relationship of ideas
	Language Arts 038	Collects/ Organizes	Information-oral/written	
	Language Arts 013	Applies/Uses	Definitions	
OBJECTIVE 22	Mathematics 229	Solves problems	Generate conclusions	Deductive reasoning
	Language Arts 013	Applies/Uses	Definitions	
	Free Enterprise 118	Identifies	Cost factors	
	Free Enterprise 065	Describes/ Explains	Economic concepts	
	Language Arts 092	Composes/ Edits	Reports/ essays	Information supplying
	Language Arts 259	Infers/ Predicts	Information-written	Rationale

	SKILL AREA/ CODE	VERB	LINK A	LINK B
OBJECTIVE 23	Language Arts 035	Attends	Directions/ task	
	Language Arts 038	Collects/ Organizes	Information-oral/written	
	Language Arts 052	Composes/ Edits	Drafts—oral/written	
	Language Arts 272	Uses	Library resources	
	Language Arts 013	Applies/Uses	Definitions	
	Language Arts 119	Composes/ Edits	Social communications/ letters	Business
	Free Enterprise 087	Describes/ Explains	Government impact/costs	
	Free Enterprise 092	Describes/ Explains	Government impact/costs	Regulations
OBJECTIVE 24	Science 042	Applies/Uses	Maps/charts/ tables/graphs	
	Language Arts 013	Applies/Uses	Definitions	
	Language Arts 278	Uses	Text Resources	

INFORMATION SHEET

FREE ENTERPRISE, GOVERNMENT, AND THE AMERICAN MARKET

XII

OBJECTIVE 1

Match terms associated with free enterprise, government, business organizations and the American market to their correct definitions.

- **Allocation**—Distribution of goods and services
- **Budget deficit**—When the total amount spent by the government is more than the total amount of tax money brought in
- **Capital**—Wealth (money or property) used or capable of being used in production
- **Capitalism**—Economic and political system characterized by elected representatives, **limited** government control, and freedoms such as the freedom of speech, the right to own property, right to choose a job, and the freedom of religion
- **Communism**—Economic and political system where the government leaders try to achieve equality by controlling almost **all** property and production and by deciding how and to whom goods and services are distributed

  EXAMPLES: U.S.S.R, China

- **Consumer Price Index**—Measures changes in prices of several hundred commodities and services purchased by urban wage earners and clerical workers

  NOTE: This includes the principal items of food, clothing, rent, transportation, medical care, recreation, entertainment, and other typical family expenditures.

- **Demand**—Amount of resources, goods or service that will be bought by consumers at a specific time for a given price
- **Depression**—Time when the natural resources, labor and capital of the nation are not fully used, people are unemployed, and many businesses fail

  EXAMPLE: The Great Depression of 1930-1941

- **Discretionary income**—Money beyond what is needed for food, clothing, shelter, and taxes; may be spent or saved any way a person desires

- **Economics**—Study of how persons can best consume, produce and distribute goods and services to try to satisfy their never-ending and ever-increasing wants
- **Federal Reserve System**—Twelve banks which do business only with commercial banks, the United States government and foreign governments
- **Fiscal policy**—Methods the federal government uses to handle taxes, expenditures and management of the national debt
- **Free enterprise system**—Economic system in which decisions are made primarily by individuals who have the freedom to choose how they will spend their money, invest their time and set their economic goals
- **Gross national product (GNP)**—Total dollar value of all goods and services produced in one year; used to measure economic growth
- **Inflation**—Noticeable rise in the average of all prices
- **Monopoly**—Situation where only one seller exists in a marketing area

  EXAMPLE: Telephone company, natural gas company, electric company
- **Natural resources**—Land, water, fuels, and raw materials required for production
- **Opportunity cost**—True value of what individuals and societies must give up when they decide to use a resource to produce one good or service instead of another
- **Profit**—Money that a producer has left after selling goods or services and paying all expenses required in the production process
- **Quota**—Limit on the amount of goods that can be imported each year
- **Recession**—Similar to a depression but shorter and milder or only affecting certain industries
- **Socialism**—Economic and political system where the government controls most means of production

- **Subsidize**—Assist or give aid to farms, industries, and publicly owned facilities from tax money

- **Supply**—Amount of resources, goods, or service that is available for exchange at a specific time for a given price

- **Technology**—Ability to produce more goods and services with fewer resources

OBJECTIVE 2

Match components of an economic system to their correct descriptions.

- **Goods and services**—Material objects and assistance provided to satisfy the wants or needs of individuals who are willing to pay to obtain them

  EXAMPLES: Goods: Food, clothing, housing, books, tools, lumber

  Services: Accounting, tax preparation, construction, tool repair, equipment rental

- **Resources**—Materials, facilities, planning, and organization required to produce and distribute goods and services

  NOTE: Resources are sometimes referred to as **factors of production**. Economists break resources into four categories: labor, land or natural resources, capital, and management.

- **Producers**—Those who provide goods and services

- **Consumers**—Those who pay to receive goods and services

- **Regulating factors**—Aspects of the economic system that determine allocation, flows, and coordination

  NOTE: A regulating factor may be part of the economic philosophy of the system, such as religious beliefs in a traditional system or freedom of choice in a free enterprise system, or the regulation may be imposed by an individual or agency, such as a government in a closed system.

- **Medium of exchange**—Means used to provide compensation for resources or goods and services

  NOTE: The medium of exchange in an economic system is the basis for placing values on all that is bought and sold. Generally, a monetary system is used as the basis of relative values. This allows comparisons to be made, for example, between the value of a skilled veterinarian's time and the value of a piece of farm equipment. Exchanges may also be made by comparing the value of two things directly or by using another standard, such as gold.

OBJECTIVE 3 **List the functions of an economic system.**

- **Resource allocation**

  NOTE: Allocation is choosing among the variety of ways of consuming or using scarce resources to produce the goods and services wanted.

- **Maintenance of flows**

  NOTE: Flow is the exchange of goods and soures for money.

- **Coordination**

  NOTE: Coordination is the influence on the economic system of group and individual decisions.

OBJECTIVE 4 **Match the economic goals of the American people to their correct descriptions.**

Traditions and social beliefs are largely responsible for determining what type of economic system is in effect. Following is a list of the more important goals which influence allocation, flows, and coordination in a free enterprise system.

At times we may find some of these may conflict. Therefore, we must try to achieve the best combination or "mix" of these goals. It is our privilege and responsibility as Americans to know the issues, vote on bills, and elect officials at all levels of government who will help achieve these goals.

- **Economic freedom**—Right of producers and consumers to make economic decisions

- **Economic efficiency**—Desire to use limited resources in the most productive and beneficial ways

- **Economic growth**—Desire for an ever-increasing standard of living for all Americans

- **Economic stability**—Freedom from major fluctuations in the nation's economy

  EXAMPLES: Fluctuations include depressions and recessions, great changes in interest rates, value of the monetary system, and employment rate

- **Economic justice**—Fair distribution of society's resources and economic advantages

  NOTE: **Fair distribution** does not necessarily meas **equal** distribution. In a free enterprise system, rewards go to those who have special skills, knowledge, and greater abilities to contribute to the good of society. Thus, the more one produces for the good of society—as viewed by the society—the more one will obtain from the society.

- **Economic security**—Desire for a certain minimum standard of living for all members of the society

  NOTE: Social programs such as Medicare and urban renewal are attempts by society to see that citizens who suffer hardships due to age, illness, unavoidable unemployment, economic fluctuations, and other adverse situations are not abandoned. Such efforts try to provide the disadvantaged with a share of the society's economic wealth.

OBJECTIVE 5 **Discuss the characteristics of a free enterprise economy.**

- **Private property**—That portion of personal income kept by the individual in the form of money, owned material goods, and investments such as stocks and bonds.

  NOTE: In a free enterprise system, the majority of property is privately owned, either by individuals or by individuals through private businesses. Some property, such as public schools, highways, etc. is **public property** because it is held by the government for the use of all citizens. Under some economic systems, there is little or no ownership on the part of private citizens.

- **Freedom of choice**—Right of consumers to spend their money as they desire and of producers to become involved in any legal business.

  NOTE: Freedom of choice is essential in a free enterprise economy. Choices made by consumers help determine what producers will provide, how much to provide, and the price at which it will be sold.

- **Profit motivation**—Desire of producers to increase their private-property holdings.

  NOTE: This desire to make a profit leads entrepreneurs to create businesses, which creates jobs and provides additional (and sometimes better) goods and services.

- **Competition**—Efforts made to attract consumers by two or more producers offering similar goods or services

  NOTE: Competition is a chief factor in the production of quality products at low prices. Competitors attempt to attract consumers by offering lower prices, added services or features, new or improved products, or by other means attractive to consumers.

OBJECTIVE 6 **Discuss the roles of government, individuals and businesses in the economy.** (Transparency Master 1)

- **Government**—The government serves as producer and consumer, as well as regulator and protector. The government also serves to promote the economic goals of the American people.

  NOTE: Federal, state, and local governments hire many employees, buy materials, establish universities, provide for police and fire protection, etc., and collect taxes to pay for costs. As a regulator and protector, the government sets rules, building codes, standards, utility rates, etc., and enforces wage and age requirements for employment.

- **Individuals and businesses**—Both individuals and businesses save money, which is then invested in machines, tools, factories, stores, offices, etc. Producers work to produce goods and services for themselves and others. Businesses provide wages, salaries and stock dividends with which individuals can save and/or purchase goods and services. Individuals make buying decisions that ultimately determines which products and services will be produced and which businesses will prosper.

OBJECTIVE 7

Select from a list facts about consumers in a free enterprise economy.

- **Allocation**
    - Consumers determine where natural resources and labor may be used.
    - Consumers make buying decisions that determine what is produced and how much is needed, thus influencing the use of resources.
- **Flows**
    - Consumers make buying decisions that determine how much will be paid for goods and services.
    - Consumers make buying decisions that influence how much of a product is required and where it will be distributed.
- **Coordination**
    - Consumers make buying decisions that help to set standards for industry.

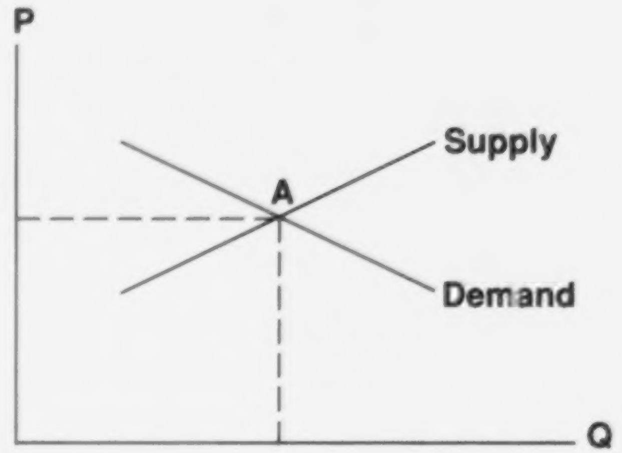
      EXAMPLE: Buyers expect a certain level of performance and dependability and certain standard features in the cars they purchase
    - Consumers affect the rate of growth in the economy through spending decisions and desires for goods and services.

OBJECTIVE 8

Discuss the function of supply and demand.

- Demand and supply are the totals of individual decisions of millions of individual buyers and sellers.
- Total quantities of demand and supply, interacting with each other, determine the price of a good or service.

  NOTE: The point where the supply and demand curves intersect (point A) determines the price and quantity of a specific good or service.



OBJECTIVE 9

List ways in which price is determined in a free enterprise economy.

- Availability of resources (supply)
- Collective buying decisions of consumers (demand)
- Marketing surveys and reviews of past sales to determine what goods and services consumers will buy and at what price

OBJECTIVE 10

Select from a list ways in which price influences flow in a free enterprise system.

- Prices determine what will be produced by showing what is profitable and not profitable to sell.

  EXAMPLE: When the selling price for soybeans is lower than the cost to produce them, then soybeans is *not* a profitable crop for the farmer to be raising.

- Prices determine how scarce resources will be used.

  EXAMPLE: If diesel fuel is selling for $1.15 per gallon and kerosene is selling for $.90 per gallon, oil available to produce kerosene or diesel fuel will be used primarily to produce diesel fuel.

- Prices determine how something will be produced.

  EXAMPLE: If a feed mill operator can select the protein source for a feed and the farmer has no preference, the operator can reduce the cost of the feed.

- Prices determine who can afford to get certain goods or services.

  EXAMPLE: If your income is $25,000 per year and you have no savings, you will not be able to buy a $400,000 ranch home.

- Individual's decisions are influenced by prices.

  EXAMPLE: Price changes influence buying and selling habits and occupational decisions.

- People collectively determine prices by what they are willing to buy.

  NOTE: This is referred to as the "economic vote."

- Producers try to learn how consumers will "vote" or purchase goods and services by studying past sales records and by conducting marketing studies.

OBJECTIVE 11

List the benefits of competition and profit.

NOTE: The **average net profit** in retailing is four percent or four cents out of every dollar of **sales**. The **average return on investment** for all industries is about 11 percent. Profits may be used to invest in new equipment, pay dividends, conduct research, and support educational and charitable organizations.

- Stimulate the development of new or improved goods and services
- Cause scarce resources to be used as efficiently as possible
- Reduce prices
- Motivate people to open new businesses
- Create more new jobs

  NOTE: No profits = No capital = No tools = No jobs
- Encourage more effective selling and promotion techniques

OBJECTIVE 12

List areas of government's involvement in the marketplace.

NOTE: When the government intervenes in the market the market does not operate solely according to the laws of supply and demand.

- Floor (minimum) and ceiling (maximum) boundaries set on wages and prices

  EXAMPLES: Minimum wage laws and price supports

  NOTE: Boundaries may affect unemployment
- Regulations on public utilities

  EXAMPLES: Telephone company, gas company, and electric company
- Tariffs on imports to encourage the sale of American goods

OBJECTIVE 13 **List reasons the government's role increased.**

- Larger populations and movement to larger cities required more goods and services

  EXAMPLE: Sewers, streets, garbage pick up, health regulations, building and zoning regulations, training of people whose skills are no longer needed because of automation, training people with economic disadvantages, and pollution controls

- Need for national defense increased

  NOTE: Major industries, such as aerospace and electronics, depend heavily on government contracts. As a result cities with defense industries such as San Diego, California, Midwest City, Oklahoma and Honolulu, Hawaii, depend on government defense activity. However, neither war nor defense are required for full employment to take place in the long run since these resources could be put into producing other products during peacetime.

- Desire for justice

  EXAMPLE: Low rent housing, equal employment opportunities for all sexes and races

- Desire for economic security

  EXAMPLE: Medicare; Federal Deposit Insurance Corporation (FDIC) to insure bank accounts; actions to try to prevent depressions, recessions, inflation, and unemployment

OBJECTIVE 14 **Discuss problems with government involvement.**

- Government is sometimes not as efficient as private business because government agencies do not have to be concerned with profit and loss.
  - Government agencies do not have to use resources as efficiently in order to make a profit or to compete in the marketplace.
  - Civil service safeguards lessen the influence of politics on government employees but may make it difficult to fire the few people who may not do a job well.

- People often lose certain freedoms of choice.

  EXAMPLE: Chemical regulations

OBJECTIVE 15

Discuss the criteria for government involvement in the marketplace.

NOTE: Thomas Jefferson said, "That government governs best which governs least."

- When profit is not the goal and a good or service is vitally needed

  EXAMPLES: Education; postal system

- When services should be available to all regardless of their ability to pay

  EXAMPLE: Fire protection

OBJECTIVE 16

Select from a list the reasons for striving to reach economic goals.

- Raise the standards of living for more people.

  NOTE: Growth while preserving the natural environment is the goal.

- Have full employment

  NOTE: The increase in population and new technological advances create a need for more people with skills and less need for people with little or no skills. Full employment does not mean that 100% of those persons able to work are employed. Four percent or more of the labor force may not be seeking employment for many reasons, such as being enrolled in school.

- Compete in the international market with countries such as Japan and Germany

- Provide assistance and guidance to developing countries

- Meet the challenge of communism to replace the United States as a leading power in the world

OBJECTIVE 17 **Distinguish among the ways the federal government influences the economy through the Federal Reserve bank's policies and through fiscal policy.** (Transparency Master 2)

The ways the federal government influences the economy through the Federal Reserve bank's policies are:

- Reserve policy
  - Promotes growth and stability by managing the supply or amount of money in the nation.
  - Manages the money supply by influencing the amount of money commercial banks must keep in reserve and how much money commercial banks can loan.

    EXAMPLE: If the Federal Reserve requires its commercial banks to hold more money in reserve, then there will be less money available from commercial banks for loans and investments. When it becomes necessary for less money to be in circulation, this is called a tight money situation.

- Discount policy
  - Commercial banks may increase their ability to make loans to the public by increasing the amount of money held in their bank's reserve.
  - Amount of money in reserve may be increased by commercial banks borrowing from a Federal Reserve bank.
  - Discount rate (interest) charged by the Federal Reserve for loans to commercial banks tells what the federal government feels should be done to help the economy.

    NOTE: High discount rates increase the costs to commercial banks and mean that less lending should be done by commercial banks to the public. Low rates decrease the costs to commercial banks and mean that more lending by commercial banks to the public should be done.

- Market operations
  - Reserves in commercial banks may be increased by the federal government buying government securities (bonds) from individuals and businesses who may have invested in government securities.

- Company which sold the government securities would place the money received from the sale in a commercial bank.

- Commercial bank can make more loans and investments because its reserves have been increased by the company's deposit.

- Fiscal Policy

  - President presents to Congress each January a budget which estimates tax collections and government spending for the new fiscal year.

  - Congress passes bills to agree or disagree with various parts of the budget.

  - Federal government may borrow money to cover the national debt by selling bonds and other securities to the public.

    EXAMPLE: An insurance company or company pension fund may buy government bonds.

  - Federal government may have to slow down the economy during inflation by increasing taxes and decreasing federal spending.

    NOTE: At times, the government may have to stimulate the economy during a depression or recession.

OBJECTIVE 18 **Distinguish among types of business organizations.**

- Private ownership (sole proprietor)

  - Business is owned by one person.

  - All decisions and policies are made by the owner.

  - Profits are enjoyed by the owner.

  - Responsibility to supply the necessary capital rests with the owner.

  - Liability of the business rests upon the owner.

- Partnership

  - Business is owned by the individuals, who share in ownership and management.

- Two or more people are able to invest more capital jointly in a business venture.
- Profits or losses are shared by the owners.
- In case of business failure, all partners may be liable to the extent of their partnership.

- Investor-oriented corporation
  - Business that requires more capital than one or two people have to invest; many people are given the opportunity to invest in the company in smaller amounts.
  - Ownership is by shares of stock.
  - Business is operated and policy is determined by an elected board of directors.
  - Capital for the business comes from the sale of stock and from returns from goods and services provided.
  - Voting by stockholders and dividends paid to the stockholders are in proportion to their ownership.
  - Services and goods provided by a regular business corporation are, for the most part, not primarily for the stockholders but are for the general public.
  - In a business failure, the corporation is liable to the full extent of its assets.

    NOTE: Each stockholder cannot lose more than the amount invested in stock.

  - There is heavy taxation.

    NOTE: Corporation profits are taxed and the remaining profits are distributed to the stockholders in the forms of dividends. There may be a tax advantage in different types of corporations, such as an "S" corporation.

- Cooperative corporation
  - Formed mainly for the members with whom to do business.
  - Formed primarily to serve its members.

- Basic policy is determined at a general meeting open to all the members.

- Members elect a board of directors who make the policy decisions.

- Each member has one vote, regardless of shares of stock that the members own or the volume of business the member has had with the cooperative.

  NOTE: Some cooperatives, where states permit, have bylaws which provide for additional votes per member based on the previous years' patronage.

- Excess net margin from the business is returned to members (owners) as patronage refunds.

- Members pay the tax on the earnings of the company.

OBJECTIVE 19

Distinguish among types of cooperative corporations and their characteristics.

- Marketing cooperatives

  EXAMPLES: Sunkist, Land-O-Lakes, Associated Milk Producers (AMP)

  - Provide a variety of off-farm processing and marketing services

  - Help producers to grow and process quality farm products to market specifications

  - Enable members to extend control of their products through the processing and marketing channels

  NOTE: These cooperatives are formed by the producers to establish common quality, common price, and set rules on processing and marketing of their product. Bargaining cooperatives do not take possession of the product or assemble, process, or distribute them.

- Purchasing cooperative

  EXAMPLES: Farmland Industries (Co-op), Mid-Continent Farms Association (MFA), Farm Bureau

  - Provides supplies for members

- Buy supplies in quantity and pass savings on to the members
- Manufacture and distribute supplies to provide an even greater savings to members
- May perform both marketing and purchasing functions

- Service cooperatives
  - Provide specialized services in areas such as livestock breeding, irrigation, farm machinery, pest control management, financial services and utilities

    EXAMPLES: Rural electric, water district and telephone cooperatives

  - Provide farm credit service

    EXAMPLES: Production Credit Association, Federal Land Bank, Bank of Cooperatives

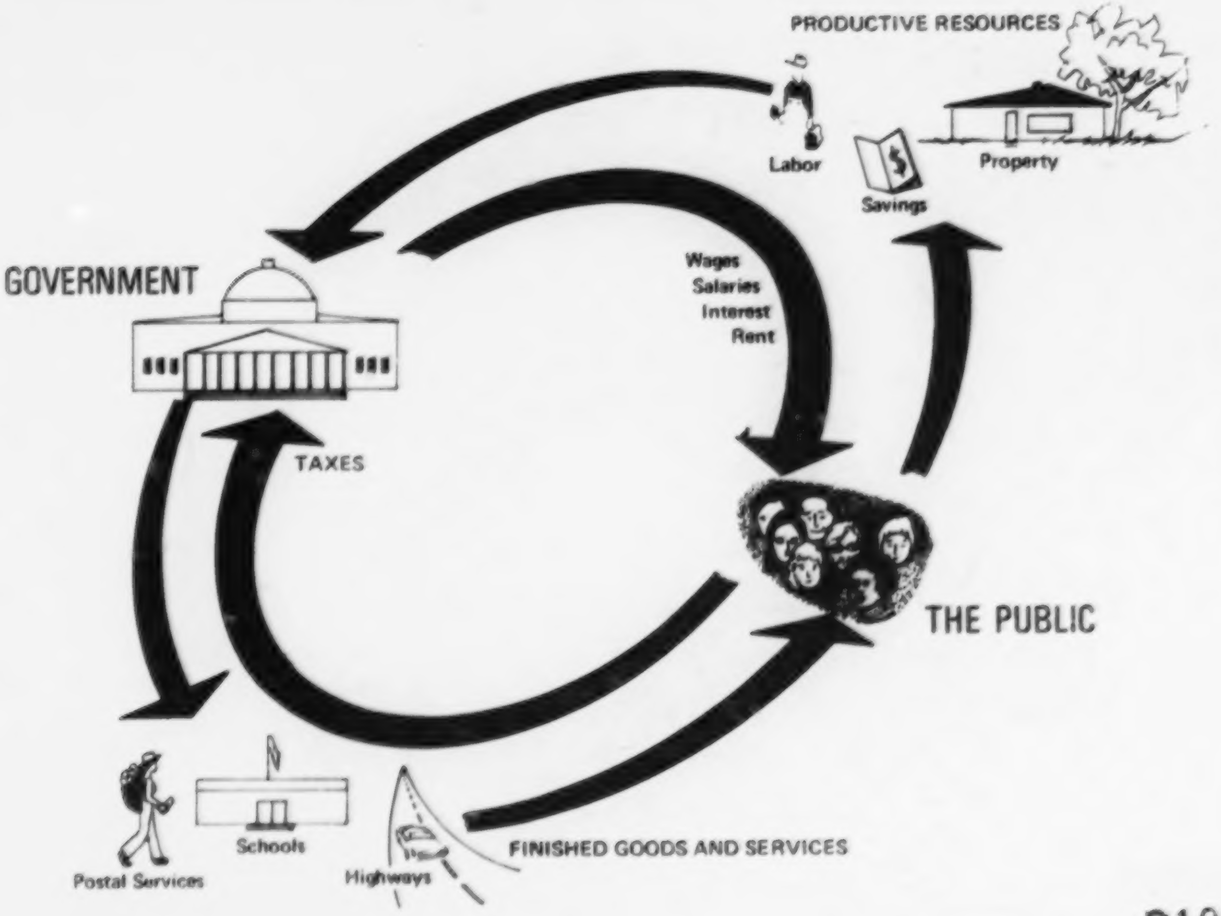
OBJECTIVE 20 **Distinguish among characteristics of various organizational patterns.** (Transparency Masters 3, 4, and 5)

- Wheel pattern
  - Common in small businesses with only one owner and several employees, also in other types of small businesses such as partnerships
  - Authority is concentrated in one person
  - Because of the small number of employees in the business, each may perform several different functions
- Line pattern (sometimes referred to as the military pattern)
  - Each employee (except for the lowest rank) supervises one or more employees
  - Each employee is responsible to only one supervisor
  - Manager (Chief Executive Officer) is responsible to the owners or the board of directors

- Staff pattern
    - Staff employee is frequently called an administrative assistant and is responsible to only a high-ranking official
    - Staff employer/employee generally has no employees that are supervised

TYPES OF BUSINESSES	FEATURES COMPARED			
	SOLE PROPRIETORSHIP	PARTNERSHIP	INVESTOR-ORIENTED CORPORATION	COOPERATIVE CORPORATION
Who Owns the Business	Owner	Two or more people	Many people by shares of stock	Members to whom they do business
How is Voting Conducted	————	As agreed upon	By stockholder in proportion to number of stocks owned	Each member has one vote
Who Manages the Company	Owner	Partners	A paid president	A paid manager
Who Gets the Profits	Owner	Partners	Stockholders	To members
How are Profits Distributed	————	As agreed upon	To stockholder in form of dividends	As patronage refunds
How are Taxes Paid	By Owner	By the partners	From the profits made	Member pays the tax on the earning

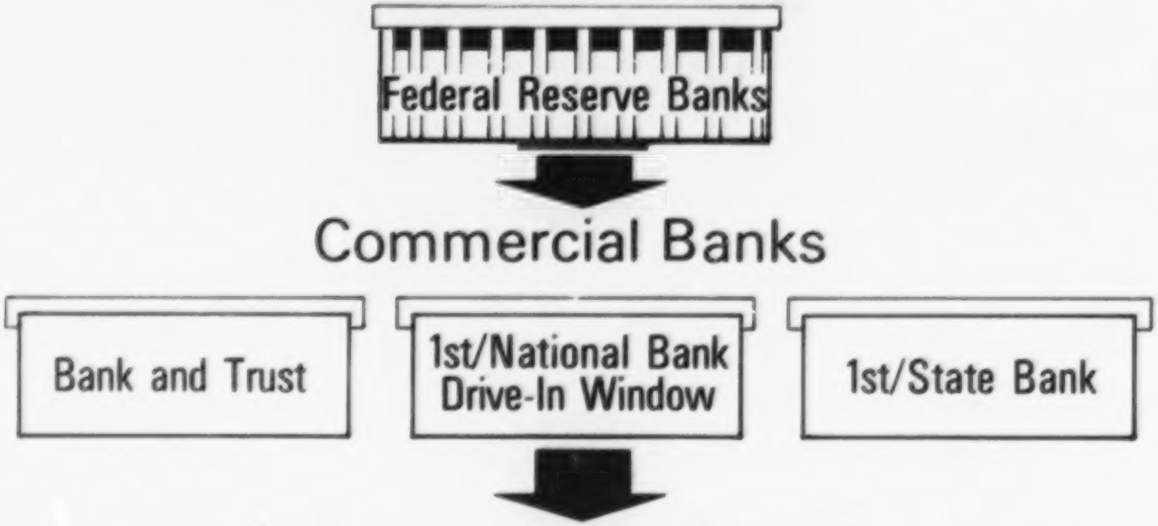
Circular Flow Between Government and the Public


PRODUCTIVE RESOURCES
Labor
Savings
Property
GOVERNMENT
Wages
Salaries
Interest
Rent
TAXES
THE PUBLIC
Postal Services
Schools
Highways
FINISHED GOODS AND SERVICES

TRANSPARENCY MASTER 2 - Sales and Service
XII - 37

Federal Reserve System

Federal Reserve Board



Federal Reserve Banks

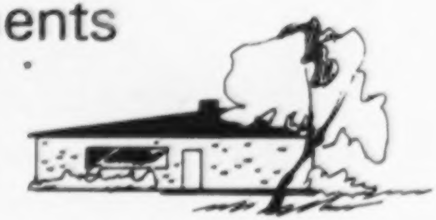
Commercial Banks

Bank and Trust
1st/National Bank Drive-In Window
1st/State Bank

Loans and Investments

Cars

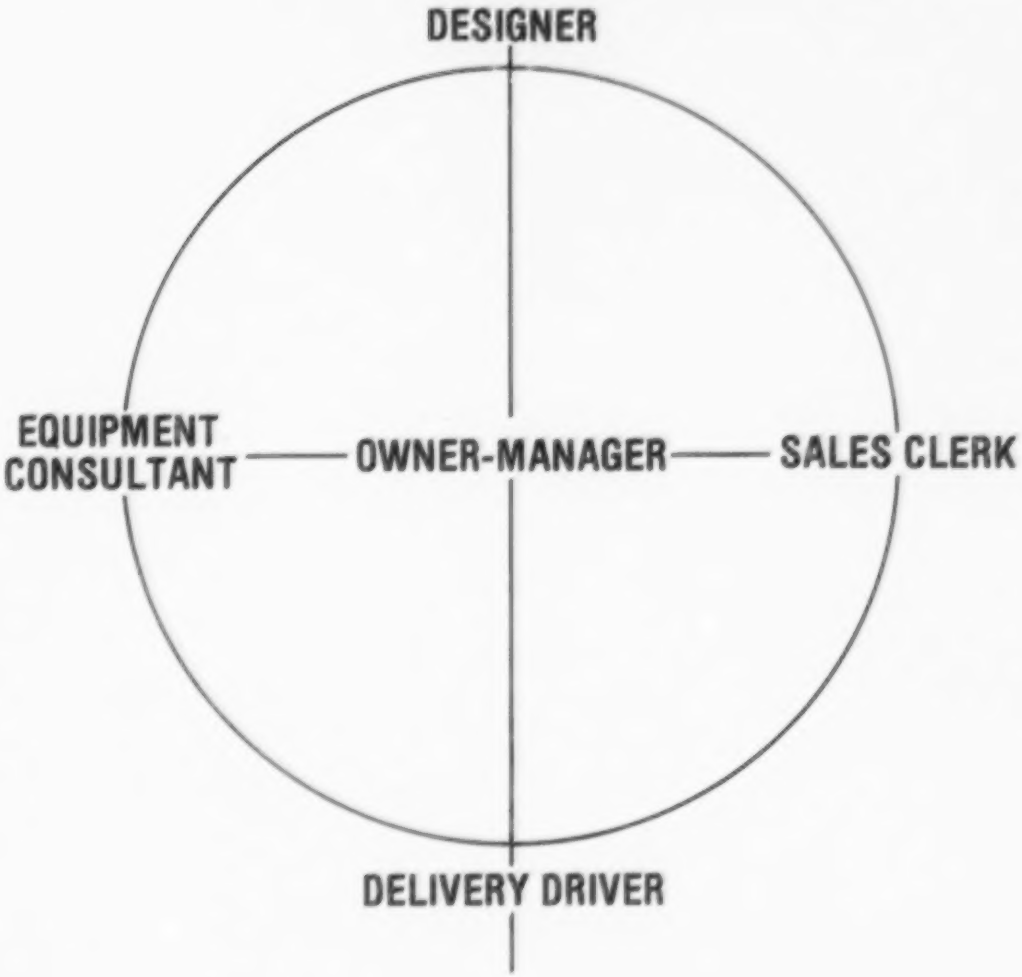
Businesses



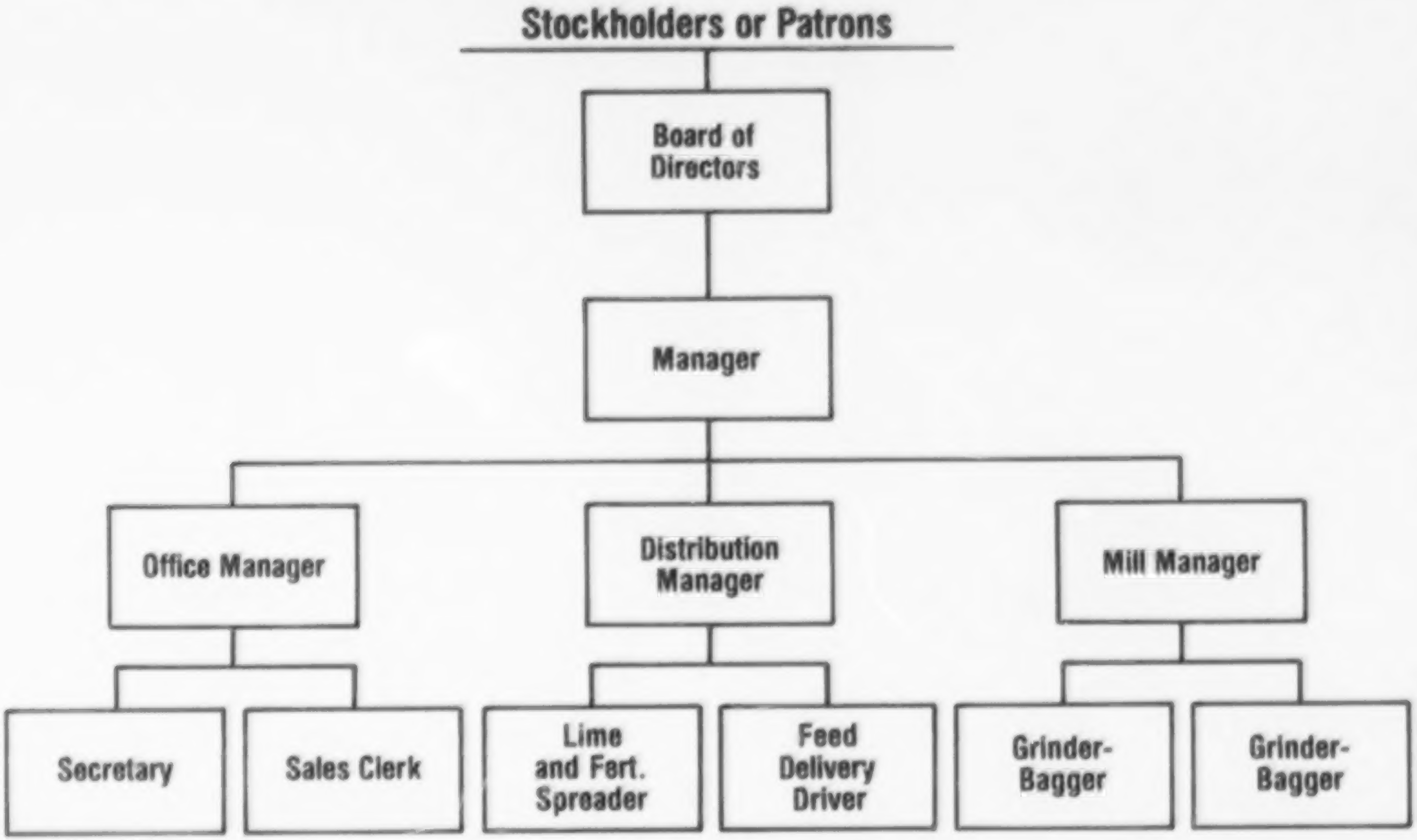
Homes

TM 2

The Wheel Pattern


DESIGNER
EQUIPMENT CONSULTANT
OWNER-MANAGER
SALES CLERK
DELIVERY DRIVER

The Line or Military Pattern



Stockholders or Patrons

Board of Directors

Manager

Office Manager

Distribution Manager

Mill Manager

Secretary

Sales Clerk

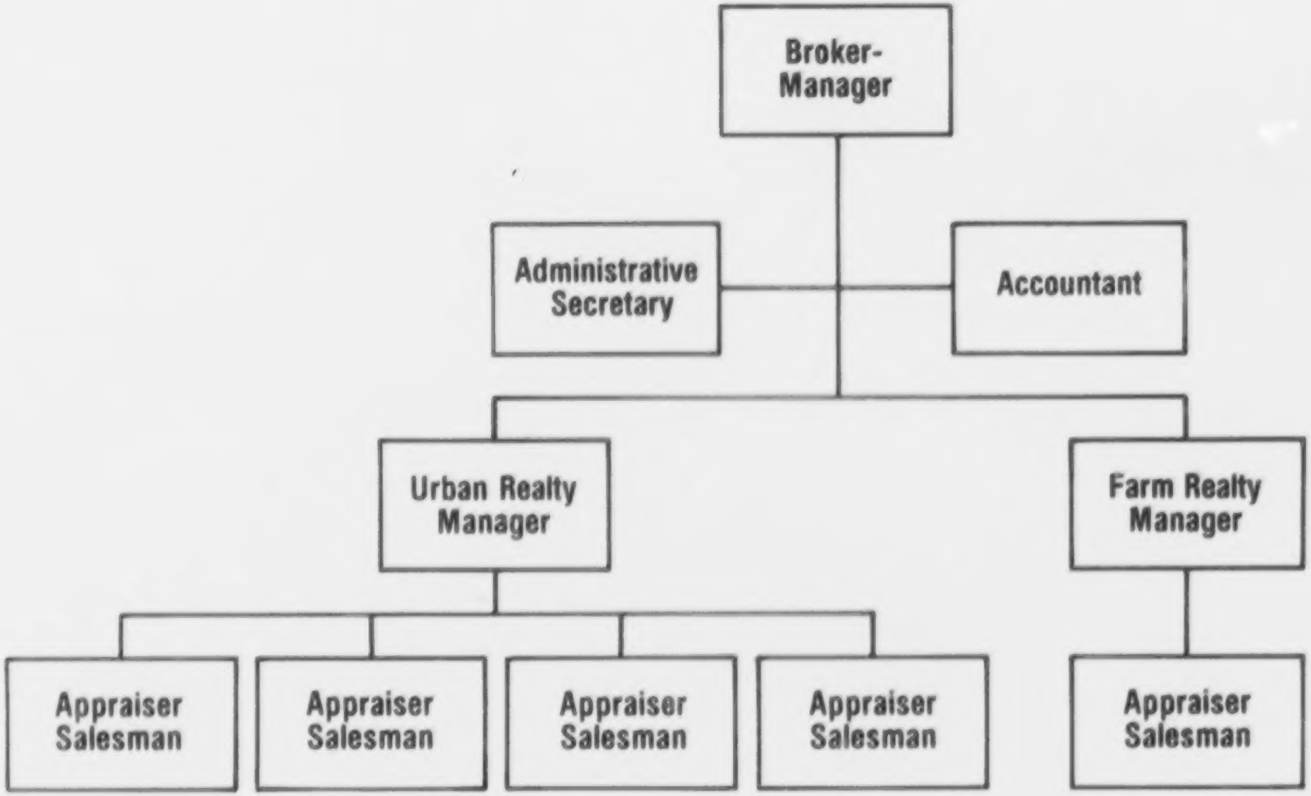
Lime and Fert. Spreader

Feed Delivery Driver

Grinder-Bagger

Grinder-Bagger

The Staff Pattern


Broker-Manager

Administrative Secretary

Accountant

Urban Realty Manager

Farm Realty Manager

Appraiser Salesman

Appraiser Salesman

Appraiser Salesman

Appraiser Salesman

Appraiser Salesman

ASSIGNMENT SHEET 1

FREE ENTERPRISE, GOVERNMENT, AND THE AMERICAN MARKET

XII

NAME ______________________ SCORE ______

OBJECTIVE 21

Analyze characteristics of a free enterprise economy.

INTRODUCTION

The characteristics of a free enterprise economy-private property, freedom of choice, profit motivation and competition - are all interrelated. For example, a city may have only a few feed stores, farriers and large animal veterinarians that are able to handle the needs of the community. These agribusinesses set their prices somewhat higher because of a lack of competition. Yet, after a new racetrack opens, the need for these goods and services increase, creating a larger market. As a result, new agribusinesses start moving in to share in the potential profit caused by the expanded market. The original agribusinesses will probably have to lower prices in order to compete.

DIRECTIONS

Use the Yellow Pages of your telephone book to analyze the characteristics of a free enterprise economy and to determine the number of agribusinesses in your area that are providing the following goods and services. This exercise will give you a good idea of how many businesses in your area are competing with each other for the consumer's dollars.

Part I

1. Feed, seed and chemicals ______________________
2. Lawn and Garden Supplies/Nurseries ______________________
3. Farm implements and tractors ______________________
4. Florist shops ______________________
5. Veterinarians ______________________
6. Lumber yards ______________________

Part II

Analyze the information in the survey to answer these questions.

1. Which agribusiness appears to have the most competition for the consumer's dollars? Explain your answer.

2. How do most firms demonstrate the free-market system?

3. What did the survey show you about profit motivation and business firms in your area?

4. What did the survey show about the use of private property by business?

ASSIGNMENT SHEET 2 — FREE ENTERPRISE, GOVERNMENT, AND THE AMERICAN MARKET XII

NAME ______________________________ SCORE ________

OBJECTIVE 22 **Apply economic principles to agribusiness situations.**

DIRECTIONS Read the following case studies that demonstrate principles of the free enterprise system at work. Write an "X" in the blanks before the principles you believe are at work, and explain your answers. More than one answer may be correct.

1. Jane Smith has $35,000 in savings and plans to use the money to start a florist shop. Jane conducted a survey of the people in the city in which she wants to locate the business. The survey shows a need for a florist, so Jane decides to open the business.

    a. Private property

    Explain ____

    ____

    ____

    ____

    ____

    ____

    b. Freedom of choice

    Explain ____

    ____

    ____

    ____

    ____

    ____

    ____

c. **Profit motivation**

Explain ____

____

____

____

____

____

____

d. Competition

Explain ____

____

____

____

____

____

____

2. John Jones owns and operates a farm supply store. John employs four sales people and a stock clerk. He has decided to change his business from a full-service to a self-service store in an effort to lower expenses and increase profits. The number of employees will be reduced to two, a cashier and a stock person.

a. Private property

Explain ____

____

____

____

____

____

b. Freedom of choice

Explain ______________________________

____

____

____

____

____

____

c. Profit motivation

Explain ______________________________

____

____

____

____

____

____

d. Competition

Explain ______________________________

____

____

____

____

____

____

____

3. Harold Johnson owns and operates a small lumberyard. Harold has decided to increase the goods provided by the store in an effort to offer items that the other lumberyard in town does not carry. The goods that will be added are hand tools and equipment. Harold will have to borrow $10,000 from a relative to add these goods.

   a. Private property

      Explain ____

      ____

      ____

      ____

      ____

      ____

   b. Freedom of choice

      Explain ____

      ____

      ____

      ____

      ____

      ____

      ____

   c. Profit motivation

      Explain ____

      ____

      ____

      ____

      ____

      ____

      ____

c. Competition

Explain ______________________________

____

____

____

____

924

FREE ENTERPRISE, GOVERNMENT, AND THE AMERICAN MARKET

NAME ______________________ SCORE ________

OBJECTIVE 23 **Collect information on the role of government in a free enterprise economy.**

INTRODUCTION One of the largest influences on the free enterprise system is the role of the various levels of government as consumer, producer or regulator. You will find that every phase of agribusiness is used to meet the consumer needs of government, and that numerous government agencies and regulations apply to agribusiness. This assignment sheet will help you become familiar with some of the roles played by government in your business.

Part I

DIRECTIONS Interview or contact by letter at least one agency from each of the following levels of government to determine the functions the agency performs and to see how government acts as a producer and regulator. Use the questions included in this assignment sheet to complete the interviews.

NOTE: You may need to use the "Blue Pages" of your telephone directory for the addresses of the agencies listed below.

1. **Federal**

EXAMPLES: Federal Trade Commission
National Weather Service
U.S. Department of Agriculture
U.S. Postal Service
Internal Revenue Service
OSHA (Occupational Safety and Health Administration)
Department of Labor-Wage and Hour Administration
Social Security Administration

a. Name of agency ______________________

____

b. With what type of business does the agency work?

____

____

____

____

c. What goods or services does the agency provide to these businesses?

____

____

____

____

d. What regulatory or protective functions are performed for these businesses?

____

____

____

____

2. **State**

EXAMPLES: Department of Agriculture
State Employment Service
State Department of Transportation
State Department of Health
Corporation Commission
Department of Commerce
Tax Commission
Secretary of State

Name of agency ______________________________

____

b. With what type of business does the agency work?

____

____

____

c. What goods or services does the agency provide to these businesses? ________________________

____

____

____

d. What regulatory or protective functions are performed for these businesses? ________________________

____

____

____

____

3. **County or City**

EXAMPLES: Board of County Commissioners
County Clerk
County Tax Assessor
County Surveyor
Highway Inspector
Buildings and Codes Department
City Engineer
Fire Marshal
County Extension Services

Name of agency ________________________

____

b. With what type of business does the agency work?

____

____

____

____

c. What goods or services does the agency provide to these businesses?

____

____

____

d. What regulatory or protective functions are performed for these businesses? ____________________

____

____

____

____

Part II

DIRECTIONS

Government agencies also serve as consumers. Contact one of the companies listed below to determine how government relates to that business as a producer, regulator, and consumer.

EXAMPLES:
- Banks or savings and loan
- Telephone company
- Gas company or electric company/rural
- Electric co-op
- Nursery
- Grain elevator
- Agri-chemical company
- Hospital
- Manufacturing company
- Retail store

Name of business ____________________________________

Type of business ____________________________________

1. What goods or services are provided for the business by the following levels of government?

   a. Federal

   ____

   ____

   ____

   ____

   b. State

   ____

   ____

   ____

   ____

c. County or City

2. How is this business affected by the regulatory functions performed by the following levels of government?

a. Federal

b. State

c. County or City

3. What services or products does the company provide to each level of government?

a. Federal

c. County or City

____

____

____

FREE ENTERPRISE, GOVERNMENT, AND THE AMERICAN MARKET

NAME ______________________________ SCORE ________

OBJECTIVE 24 **Complete a business organization worksheet.**

DIRECTIONS Based on your class discussions and the information in Supplement 1 in this unit, fill in the blanks on the worksheet on the back of this page.

TYPES OF BUSINESSES	FEATURES COMPARED			
	SOLE PROPRIETORSHIP	PARTNERSHIP	INVESTOR-ORIENTED CORPORATION	COOPERATIVE CORPORATION
Who Owns the Business				
How is Voting Conducted				
Who Manages the Company				
Who Gets the Profits				
How are Profits Distributed				
How are Taxes Paid				

ASSIGNMENT ANSWERS

FREE ENTERPRISE, GOVERNMENT, AND THE AMERICAN MARKET

XII

ASSIGNMENT SHEET 1

Student's answers will vary. Insure that the student completed the exercise using the principles taught in the information sheet.

ASSIGNMENT SHEET 2

1. b. Freedom of choice—As a producer, Jane is free to choose a business to operate.

   c. Profit motivation—Jane's survey determined the need for a florist shop in that city; Jane's decision to start a business is based on her desire to make money and the fact that the survey indicates that she should be able to.

   NOTE: Some students may list private property as another principle at work here. There is some basis for this conclusion, but the instructor should use such a situation as an opportunity to explain how Jane's investment of private property also functions as the use of resources by her business.

2. c. Profit motivation—John has taken steps to reduce his expenses in order to increase profits.

   NOTE: Profit motivation is the primary principle at work here. A student may justify to some extent that John has exercised freedom of choice in changing the business. Competition may have made it necessary for John to take this action, but that cannot be determined from the information given.

3. a. Private property—The investment of $10,000 by Pat's relative represents the use of private property in the free enterprise system.

   d. Competition—Harold's decision to offer the additional goods is an attempt to make the lumberyard more attractive to consumers by providing goods not offered by Harold's competitor

NOTE: Again, freedom of choice and profit motivation are also at work, but the primary principles illustrated in this case are private property and competition.

ASSIGNMENT SHEET 3

Insure that the student has contacted at least one of the agencies listed in each category and has completed all of the questions. Check for spelling and grammar usage.

ASSIGNMENT SHEET 4

TYPES OF BUSINESSES	FEATURES COMPARED			
	SOLE PROPRIETORSHIP	PARTNERSHIP	INVESTOR-ORIENTED CORPORATION	COOPERATIVE CORPORATION
Who Owns the Business	Owner	Two or more people	Many people by shares of stock	Members to whom they do business
How is Voting Conducted	———	As agreed upon	By stockholder in proportion to number of stocks owned	Each member has one vote
Who Manages the Company	Owner	Partners	A paid president	A paid manager
Who Gets the Profits	Owner	Partners	Stockholders	To members
How are Profits Distributed	———	As agreed upon	To stockholder in form of dividends	As patronage refunds
How are Taxes Paid	By Owner	By the partners	From the profits made	Member pays the tax on the earning

935

WRITTEN TEST

FREE ENTERPRISE, GOVERNMENT, AND THE AMERICAN MARKET

XII

NAME ______________________________ SCORE _______

OBJECTIVE 1

Match terms associated with free enterprise government, business organizations and the American market to their correct definitions. Write the correct letters in the blanks.

____ 1. Distribution of goods and services

____ 2. When the total amount spent by the government is more than the total amount of tax money brought in

____ 3. Wealth (money or property) used or capable of being used in production

____ 4. Measures changes in prices of several hundred commodities and services purchased by urban wage earners and clerical workers

____ 5. Amount of resources, goods or service that will be bought by consumers at a specific time for a given price

____ 6. Time when the natural resources, labor and capital of the nation are not fully used, people are unemployed, and many businesses fail

____ 7. Study of how persons can best consume, produce, and distribute goods and services to try to satisfy their never-ending and ever-increasing wants

____ 8. Twelve banks which do business only with commercial banks, the United States government and foreign governments

a. Profit
b. Supply
c. Allocation
d. Capital
e. Demand
f. Economics
g. Inflation
h. Technology
i. Recession
j. Quota
k. Budget deficit
l. Communism
m. Depression
n. Fiscal Policy
o. Monopoly
p. Opportunity cost
q. Subsidize
r. Natural resources
s. Discretionary income
t. Federal Reserve System

____9. Economic and political system characterized by elected representatives, limited government control, and freedoms such as the freedom of speech, the right to own property, right to choose a job, and the freedom of religion

____10. Economic and political system where the government leaders try to achieve equality by controlling almost all property and production and by deciding how goods and services are distributed

____11. Money beyond what is needed for food, clothing, shelter, and taxes; may be spent or saved any way a person desires

____12. Situation where only one seller exists in a marketing area

____13. Land, water, fuels, and raw materials required for production

____14. True value of what individuals and societies must give up when they decide to use a resource to produce one good or instead of another

____15. Money that a producer has left after selling goods or services and paying all expenses required in the production process

____16. Similar to a depression but shorter and milder or only affecting certain industries

____17. Economic and political system where the government controls most means of production

____18. Amount of resources, goods, or service that is available for exchange at a specific time for a given price

____19. Ability to produce more goods and services with fewer resources

u. Free enterprise system

v. Gross national product (GNP)

w. Capitalism

x. Consumer Price Index

y. Socialism

z. Democracy

___ 20. Methods the federal government uses to handle taxes, expenditures and management of the national debt

___ 21. Economic system in which decisions are made primarily by individuals who have the freedom to choose how they will spend their money, invest their time and set their economic goals

___ 22. Total dollar value of all goods and services produced in one year; used to measure economics growth

___ 23. Noticeable rise in the average of all prices

___ 24. Limit on the amount of goods that can be imported each year

___ 25. Assist or give aid to farms, industries, and publicly owned facilities from tax money

OBJECTIVE 2

Match components of an economic system to their correct descriptions. Write the correct letters in the blanks.

___ 1. Those who provide goods and services

___ 2. Materials, facilities, planning, and organization required to produce and distribute goods and services

___ 3. Aspects of the economic system that determine allocation, flows, and coordination

___ 4. Those who pay to receive goods and services

___ 5. Means used to provide compensation for resources or goods and services

___ 6. Material objects and assistance provided to satisfy the wants or needs of individuals who are willing to pay to obtain them

a. Goods and services
b. Manufactured products
c. Consumers
d. Capital
e. Producers
f. Currency
g. Directional factors
h. Resources
i. Medium of exchange
j. Regulating factors

OBJECTIVE 3

List the functions of an economic system.

____

____

____

____

____

____

OBJECTIVE 4

Match the economic goals of the American people to their correct descriptions. Write the correct letters in the blanks.

____1. Desire for an ever-increasing standard of living for all Americans

____2. Desire for a certain minimum standard of living for all members of the society

____3. Right of producers and consumers to make economic decisions

____4. Desire to use limited resources in the most productive and beneficial ways

____5. Fair distribution of society's resources and economic advantages

____6. Freedom from major fluctuations in a nation's economy

a. Economic freedom

b. Economic efficiency

c. Economic growth

d. Economic stability

e. Economic justice

f. Economic security

OBJECTIVE 5

Discuss the characteristics of a free enterprise economy.

1. **Private property—**

____

____

____

____

2. **Freedom of choice—**

3. **Profit motivation—**

4. **Competition—**

OBJECTIVE 6

Discuss the roles of government, individuals and businesses in the economy.

OBJECTIVE 7 **Select from a list facts about consumers in a free enterprise economy.** Write an "X" in the blank before each true statement.

____ 1. Consumers determine where natural resources and labor may be used.

____ 2. Consumers make buying decisions that determine what is produced and how much is needed, thus influencing the use of resources.

____ 3. Consumers make buying decisions that determine how much will be paid for goods and services.

____ 4. Consumers make buying decisions that influence how much of a product is required and where it will be distributed.

____ 5. Consumers provide jobs.

____ 6. Consumers provide the management necessary to supply goods and services.

____ 7. Consumers make buying decisions that help to set standards for industry.

____ 8. Consumers affect the rate of growth in the economy through spending decisions and desires for goods and services.

OBJECTIVE 8 **Discuss the function of supply and demand.**

____

____

____

____

____

____

____

____

____

____

942

OBJECTIVE 9

List ways in which price is determined in a free enterprise economy.

OBJECTIVE 10

Select from a list ways in which price influences flows in a free enterprise system. Write an "X" in the blank before each true statement.

____ 1. Prices determine what will be produced by showing what is profitable and not profitable to sell.

____ 2. Prices determine quality of goods and services.

____ 3. Prices determine how something will be produced.

____ 4. Prices determine how scarce resources will be used.

____ 5. Prices determine who can afford to get certain goods or services.

OBJECTIVE 11

List the benefits of competition and profit. Write four benefits in the space provided.

OBJECTIVE 12 **List areas of government involvement in the marketplace.**

OBJECTIVE 13 **List reasons the government's role increased.** Write three reasons in the space provided.

OBJECTIVE 14 **Discuss problems with government involvement.**

OBJECTIVE 15

Discuss the criteria for government involvement in the marketplace.

____

____

____

____

____

____

____

____

____

____

OBJECTIVE 16

Select from a list reasons for striving to reach economic goals. Write an "X" in the blanks before each true statement.

____ 1. Raise the standard of living for the upper classes

____ 2. Have full employment

____ 3. Compete in the international market with countries such as Japan and Germany

____ 4. Meet the challenge of communism to replace the United States as a leading power in the world

____ 5. Provide assistance and guidance to developing countries

OBJECTIVE 17

Distinguish among the ways the federal government influences the economy through the Federal Reserve bank's policies and through fiscal policy. Write an "R" in the blank before the statement that distinguishes Reserve Policy, a "D" in the blank before the statement that distinguishes Discount Policy, an "M" in the blank before the statement that distinguishes Market Operations, and an "F" in the blank before the statement that distinguishes Fiscal Policy.

NOTE: Each letter will be used more than once.

____ 1. Promotes growth and stability by managing the supply or amount of money in the nation.

____ 2. Commercial banks may increase their ability to make loans to the public by increasing the amount of money held in their bank's reserve.

____ 3. Company which sold the government securities would place the money received from the sale in a commercial bank.

____ 4. Federal government may have to slow down the economy during inflation by increasing taxes and decreasing federal spending.

____ 5. President presents to Congress each January a budget which estimates tax collections and government spending for the new fiscal year.

____ 6. Discount rate (interest) charged by the Federal Reserve for loans to commercial banks tells what the federal government feels should be done to help the economy.

____ 7. Reserves in commercial banks may be increased by the federal government buying government securities (bonds) from individuals and businesses who may have invested in government securities.

____ 8. Manages the money supply by influencing the amount of money commercial banks must keep in reserve and how much money commercial banks can loan.

____ 9. Congress passes bills to agree or disagree with various parts of the budget.

___ 10. Commercial banks can make more loans and investments because its reserves have been increased by the company's deposit.

___ 11. Amount of money in reserve may be increased by commercial banks borrowing from a Federal Reserve bank.

___ 12. Federal government may borrow money to cover the national debt by selling bonds and other securities to the public.

OBJECTIVE 18

Distinguish among types of business organizations. Listed below are some of the characteristics of the various types of business organizations. In the blanks write the letter that identifies the type of organization each characteristic is associated with.

____ 1. Business is owned by one person.
____ 2. Members pay the tax on the earnings of the company.
____ 3. Ownership is by shares of stock.
____ 4. Business is owned by the individuals, who share in ownership and management.
____ 5. Formed mainly for the members with whom to do business.
____ 6. Members elect a board of directors who make policy decisions.
____ 7. Profits are enjoyed by the owner.
____ 8. Responsibility to supply the necessary capital rests with the owner.
____ 9. Voting by stockholders and dividends paid to the stockholders are in proportion to their ownership.
___ 10. Capital for the business comes from the sale of stock and from returns from goods and services provided.

a. Private ownership
b. Partnership
c. Investor oriented corporation
d. Cooperative corporation

OBJECTIVE 19

Distinguish among the types of cooperative corporations and their characteristics. In the blanks write the letter that identifies the correct type of cooperative corporation with the appropriate characteristic.

____1. Buy supplies in quantity and pass savings on to the members

____2. Help producers to grow and process quality farm products to market specifications

____3. May perform both marketing and purchasing functions

____4. Provide specialized services in areas such as livestock breeding, irrigation, farm machinery, pest control management, financial services, and utilities.

____5. Enable members to extend control of their products through the processing and marketing channels

a. Marketing cooperative

b. Purchasing cooperative

c. Service cooperative

OBJECTIVE 20

Distinguish among characteristics of various organizational patterns. In the blanks write the letter that matches the correct organizational pattern with the appropriate characteristic.

____1. Manager (Chief Executive Officer) is responsible to the owners or the board of directors

____2. Staff employer/employee generally has **no** employees that are supervised

____3. Each employee (except for the lowest rank) supervises one or more employees

____4. Authority is concentrated in one person

____5. Because of the small number of employees in the business, each may perform several different functions

a. Wheel pattern

b. Line pattern

c. Staff pattern

NOTICE	The following assignment sheets are not a part of the written test. If these activities have not been completed, check with your instructor.	
OBJECTIVE 21	**Analyze characteristics of a free enterprise economy.**	SCORE ______
OBJECTIVE 22	**Apply economic principles to agribusiness situations.**	SCORE ______
OBJECTIVE 23	**Collect information on the role of government in a free enterprise economy.**	SCORE ______
OBJECTIVE 24	**Complete a business structure worksheet.**	SCORE ______

WRITTEN TEST ANSWERS

FREE ENTERPRISE, GOVERNMENT, AND THE AMERICAN MARKET

XII

OBJECTIVE 1

1. ii
2. n
3. d
4. cc
5. e
6. p
7. h
8. y
9. bb
10. o
11. x
12. r
13. v
14. t
15. a
16. l
17. ff
18. b
19. j
20. q
21. z
22. aa
23. i
24. m
25. u

OBJECTIVE 2

1. e
2. h
3. j
4. c
5. i
6. a

OBJECTIVE 3

1. Resource allocation
2. Maintenance of flows
3. Coordination

OBJECTIVE 4

1. c
2. f
3. a
4. b
5. e
6. d

OBJECTIVE 5

Description should include the following:

1. **Private property**—That portion of personal income kept by the individual in the form of money, owned material goods, and investments such as stocks and bonds.
2. **Freedom of choice**—Right of consumers to spend their money as they desire and of producers to become involved in any legal business
3. **Profit motivation**—Desire of producers to increase their private-property holdings
4. **Competition**—Efforts made to attract consumers by two or more producers offering similar goods and services

OBJECTIVE 6

Discussions should include the following:

- Government serves as producer and consumer, as well as regulator and protector. It also serves to promote the economic goals of the American people.
- Individuals and businesses save money, which is then invested in machines, tools, factories, stores, offices, etc. Producers work to produce goods and services for themselves and others. Businesses provide wages, salaries and stock dividends with which individuals can save and/or purchase goods and services.

OBJECTIVE 7

1, 2, 3, 4, 7, 8

OBJECTIVE 8

Discussion should include the following:

- Demand and supply are the totals of individual decisions of millions of individual buyers and sellers.
- Total quantities of demand and supply, interacting with each other, determine the price of a good or service.

OBJECTIVE 9

- Availability of resources (supply)
- Collecting buying decisions of consumers (demand)
- Marketing surveys and reviews of past sales to determine what goods and services consumers will buy and at what price.

OBJECTIVE 10

1, 3, 4, 5

OBJECTIVE 11

Answer should include four of the following:

- Stimulate the development of new or improved goods and services
- Cause scarce resources to be used as efficiently as possible
- Reduce prices
- Motivate people to open new businesses
- Create more new jobs
- Encourage more effective selling and promotion techniques

OBJECTIVE 12

- Floor (minimum) and ceiling (maximum) boundaries set on wages and prices
- regulations on public utilities
- Tariffs on imports to encourage the sale of American goods

OBJECTIVE 13

Answer should include three of the following:

- Larger populations and movement to larger cities required more goods and services
- Need for national defense increased
- Desire for justice
- Desire for economic security

OBJECTIVE 14

Discussion should include:

- Government is not as efficient as private business because government agencies do not have to be concerned with profit and loss.
    1) Government agencies do not have to use resources as efficiently in order to make a profit or to compete in the marketplace.

2) Civil service safeguards lessen the influence of politics on government employees but may make it difficult to fire the few people who may not do a job well.

- People often lose certain freedoms of choice.

OBJECTIVE 15 Discussion should include:

- When profit is not the goal and a good or service is vitally needed
- When services should be available to all regardless of ability to pay

OBJECTIVE 16 2, 3, 4, 5

OBJECTIVE 17

1. r
2. d
3. m
4. f
5. f
6. d
7. m
8. r
9. f
10. m
11. d
12. f

OBJECTIVE 18

1. a
2. d
3. c
4. b
5. d
6. d
7. a
8. a
9. c
10. c

OBJECTIVE 19

1. b
2. a
3. b
4. c
5. a

OBJECTIVE 20	1. b 2. c 3. b 4. a 5. a
OBJECTIVE 21	Refer to answers to Assignment Sheet 1.
OBJECTIVE 22	Refer to answers to Assignment Sheet 2.
OBJECTIVE 23	Refer to answers to Assignment Sheet 3.
OBJECTIVE 24	Refer to answers to Assignment Sheet 4.

END

U.S. Dept. of Education

Office of Education
Research and
Improvement (OERI)

ERIC

Date Filmed

March 21,1991